Chapter

23 The USA since 1945

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SUMMARY OF EVENTS

When the Second World War ended in 1945, the economic boom continued as factories switched from producing armaments to producing consumer goods. Lots of new goods had appeared by this time – TV sets, dishwashers, modern record players and tape recorders – and many ordinary working people could afford to buy these luxury goods for the first time. This was the big difference between the 1950s and the 1920s, when too many people had been too poor to keep the boom going. The 1950s was the time of the *affluent society*, and in the 20 years following the end of the war, GNP increased by almost eight times. *The USA continued to be the world's largest industrial power and the world's richest nation.*

In spite of the general affluence, there were still serious problems in American society. There was a great deal of poverty and constant unemployment; black people, on the whole, were still not getting their fair share of the prosperity, did not have equal rights with whites and were treated as second-class citizens. The Cold War caused some problems for Americans at home and led to another outbreak of anti-communist feeling, like the one after the First World War. There were unhappy experiences such as the assassinations of President Kennedy in Dallas, Texas, allegedly by Lee Harvey Oswald (1963), and of Dr Martin Luther King (1968). There was the failure of American policy in Vietnam, and the forced resignation of President Nixon (1974) as a result of the Watergate scandal, which shook confidence in American society and values, and in the American system. One reaction to this state of affairs was a wave of religious revivalism that led to calls for a return to a more strict moral code. The Christian 'New Right' became influential in politics, supporting Ronald Reagan and later George W. Bush.

After 1974 both political parties took turns in power, and confidence was gradually restored. Americans could claim that with the collapse of communism in Europe and the ending of the Cold War, their country had reached the peak of its achievement; it was now the world's only remaining superpower. Many Americans believed that, wherever it was necessary, the USA, the land of liberty and democracy, would lead the rest of the world forward into an era of peace and prosperity. However, as we saw in Chapter 12, the American attitude was resented so much that many people were driven towards extreme measures – terrorism, culminating in the terrible events of 11 September 2001, when the World Trade Center in New York was destroyed. President George W. Bush issued a declaration of war on terrorism and the USA became embroiled in a long military campaign in Iraq and Afghanistan. This was still continuing in 2013, an involvement that had important effects on domestic affairs in the USA. By the end of Bush's second term in 2008, the US economy was in a state of crisis, and the Republicans were defeated in the presidential election of November 2008. The Democrat, Barack Obama, became the USA's first African American president.

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The presidents of the post-war period were:

1945–53	Harry S. Truman	Democrat
1953–61	Dwight D. Eisenhower	Republican
1961–3	John F. Kennedy	Democrat
1963–9	Lyndon B. Johnson	Democrat
1969–74	Richard M. Nixon	Republican
1974–7	Gerald R. Ford	Republican
1977–81	Jimmy Carter	Democrat
1981–9	Ronald Reagan	Republican
1989–93	George Bush	Republican
1993–2001	Bill Clinton	Democrat
2001–2009	George W. Bush	Republican
2009–	Barack Obama	Democrat

23.1 POVERTY AND SOCIAL POLICIES

Ironically in the world's richest country, poverty remained a problem. Although the economy was on the whole a spectacular success story, with industry flourishing and exports booming, there was constant unemployment, which crept steadily up to 5.5 million (about 7 per cent of the labour force) in 1960. In spite of all the New Deal improvements, social welfare and pensions were still limited, and there was no national health system. It was calculated that in 1966 some 30 million Americans were living below the poverty line, and many of them were aged over 65.

(a) Truman (1945–53)

Harry S. Truman, a man of great courage and common sense, once compared by a reporter to a bantam-weight prize fighter, had to face the special problem of returning the country to normal after the war. This was achieved, though not without difficulties: removal of wartime price controls caused inflation and strikes, and the Republicans won control of Congress in 1946. In the fight against poverty he had put forward a programme known as *the Fair Deal*, which he hoped would continue Roosevelt's New Deal. It included *a national health scheme, a higher minimum wage, slum clearance and full employment.*

However, the Republican majority in Congress threw out his proposals, and even passed, despite his veto, the Taft–Hartley Act (1947), which reduced trade-union powers. The attitude of Congress gained Truman working-class support and enabled him to win the 1948 presidential election, together with a Democrat majority in Congress. Some of the Fair Deal then became law (extension of social security benefits and an increase in the minimum wage), but Congress still refused to pass his national health and old-age pension schemes, which was a bitter disappointment for him. Many Southern Democrats voted against Truman because they disapproved of his support for black civil rights.

(b) Eisenhower (1953–61)

Dwight D. Eisenhower had no programme for dealing with poverty, though he did not try to reverse the New Deal and the Fair Deal. Some improvements were made:

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- insurance for the long-term disabled;
- financial help towards medical bills for people over 65;
- federal cash for housing;
- an extensive road-building programme, beginning in 1956, which over the next 14 years gave the USA a national network of first-class roads; this was to have important effects on people's everyday lives: cars, buses and trucks became the dominant form of transport, the motor industry received a massive boost, and this contributed towards the prosperity of the 1960s;
- more spending on education to encourage study in science and mathematics (it was feared that the Americans were falling behind the Russians, who in 1957 launched the first space satellite – Sputnik).

Farmers faced problems in the 1950s because increased production kept prices and incomes low. The government spent massive sums paying farmers to take land out of cultivation, but this was not a success: farm incomes did not rise rapidly and poorer farmers hardly benefited at all. Many of them sold up and moved into the cities.

Much remained to be done, but the Republicans were totally against national schemes such as Truman's health service, because they thought they were too much like socialism. However, some progress was made towards fairer treatment of the black population (see the next section).

(c) Kennedy (1961–3)

By the time John F. Kennedy became president in 1961, the problems were more serious, with over 4.5 million unemployed. He won the election partly because the Republicans were blamed for inflation and unemployment, and because he ran a brilliant campaign, accusing them of neglecting education and social services. He came over as elegant, articulate, witty and dynamic, and his election seemed to many people to be the beginning of a new era. He had a detailed programme which included medical payments for the poor and aged, more federal aid for education and housing, and increased unemployment and social security benefits. 'We stand today on the edge of a New Frontier', he said, and implied that only when these reforms were introduced would the frontier be crossed and poverty eliminated.

Unfortunately for Kennedy, he had to face strong opposition from Congress, where many right-wing Democrats as well as Republicans viewed his proposals as 'creeping socialism'. Hardly a single one was passed without some watering down, and many were rejected completely. Congress would allow no extra federal cash for education and rejected his scheme to pay hospital bills for elderly people. His successes were:

- an extension of social security benefits to each child whose father was unemployed;
- raising of the minimum wage from $1 to $1.25 an hour;
- federal loans to enable people to buy houses;
- federal grants to the states enabling them to extend the period covered by unemployment benefit.

Kennedy's overall achievement was limited: unemployment benefit was only enough for subsistence, and even that was only for a limited period. Unemployment still stood at 4.5 million in 1962, and soup kitchens had to be set up to feed poor families.

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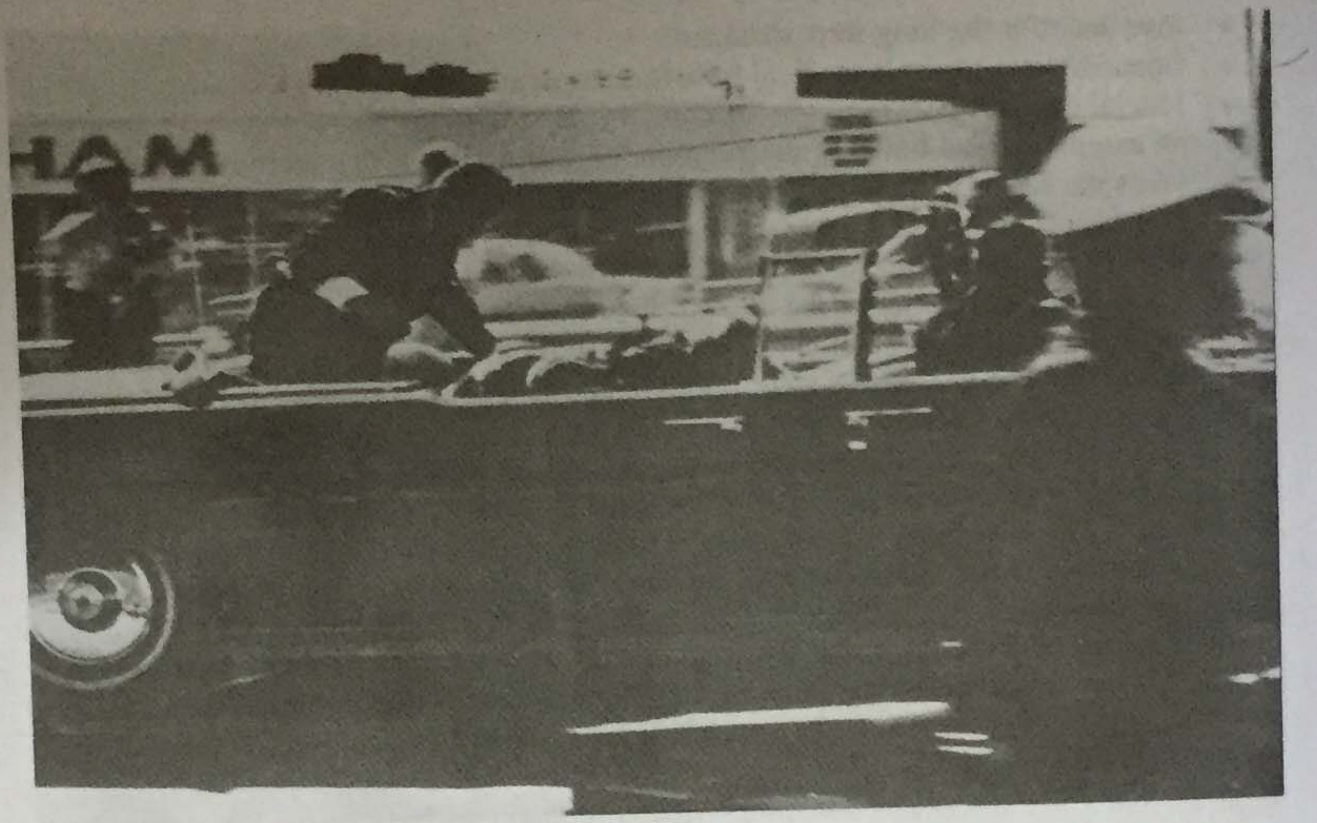

Illustration 23.1 **The assassination of Kennedy, 1963. Here the president slumps forward, seconds after having been shot**

(d) Johnson (1963–9)

Kennedy's vice-president, Lyndon B. Johnson, became president when Kennedy was assassinated in Dallas, Texas, in 1963 (see Illus. 23.1). Coming from a humble background in Texas, he was just as committed as Kennedy to social reform, and achieved enough in his first year to enable him to win a landslide victory in the 1964 election. In 1964 Johnson's economic advisers fixed an annual income of $3000 for a family of two or more as the poverty line, and they estimated that over 9 million families (30 million people, nearly 20 per cent of the population) were on or below the line. Many of them were African Americans, Puerto Ricans, Native Americans (American Indians) and Mexicans. Johnson announced that he wanted to move America towards *the Great Society*, where there would be an end to poverty and racial injustice and 'abundance and liberty for all'.

Many of his measures became law, partly because after the 1964 elections the Democrats had a huge majority in Congress, and partly because Johnson was more skilful and persuasive in handling Congress than Kennedy had been.

- The *Economic Opportunity Act (1964)* provided a number of schemes under which young people from poor homes could receive job training and higher education.
- Other measures were the provision of federal money for special education schemes in slum areas, including help in paying for books and transport; financial aid for clearing slums and rebuilding city areas; and *the Appalachian Regional Development Act (1965)*, which created new jobs in one of the poorest regions.
- Full voting and civil rights were extended to all Americans, regardless of their colour (see the next section).
- Perhaps his most important innovation was *the Social Security Amendment Act (1965)*, also known as *Medicare*: this was a partial national health scheme, though it applied only to people over 65.

This is an impressive list, and yet the overall results were not as successful as Johnson would have hoped, for a number of reasons. His major problem from early 1965 was that *he was faced by the escalating war in Vietnam* (see Section 8.3). Johnson's great dilemma was how to fund both the war in Vietnam and the war on poverty. It has been suggested that the entire Great Society programme was under-financed because of the enormous expenditure on the war in Vietnam. The Republicans criticized Johnson for wanting to spend money on the poor instead of concentrating on Vietnam; they were supporters of *the strong American tradition of self-help*: it was up to the poor to help themselves and wrong to use taxpayers' money on schemes which, it was thought, would only make the poor more lazy. Thus many state governments failed to take advantage of federal offers of help. And the unfortunate president, trying to fight both wars at the same time, ended up losing in Vietnam, winning only a limited victory in the war against poverty, and damaging the US economy as well.

In the mid-1960s violence increased and seemed to be getting out of hand: there were riots in black ghettos, where the sense of injustice was strongest; there were student riots in the universities in protest against the Vietnam War. There were a number of political assassinations – President Kennedy in 1963, Martin Luther King and Senator Robert Kennedy in 1968. Between 1960 and 1967 the number of violent crimes rose by 90 per cent. Johnson could only hope that his 'war on poverty' would gradually remove the causes of discontent; beyond that he had no answer to the problem. The general discontent and especially the student protests about Vietnam ('LBJ, LBJ, how many kids have you burnt today?') caused Johnson not to stand for re-election in November 1968, and it helps to explain why the Republicans won, on a platform of restoring law and order.

(e) Nixon (1969–74)

Unemployment was soon rising again, with over 4 million out of work in 1971; their plight was worsened by rapidly rising prices. The Republicans were anxious to cut public expenditure; Nixon reduced spending on Johnson's poverty programme, and introduced a wages and prices freeze. However, social security benefits were increased, Medicare was extended to disabled people under 65, and a Council for Urban Affairs was set up to try to deal with the problems of slums and ghettos. Violence was less of a problem under Nixon, partly because protesters could now see the approaching end of America's controversial involvement in Vietnam, and because students were allowed some say in running their colleges and universities.

During the last quarter of the twentieth century, in spite of some economic success under Reagan, the underlying problem of poverty and deprivation was still there. In the world's richest country there was a permanent underclass of unemployed, poor and deprived people, the inner cities needed revitalizing, and yet federal spending on welfare, although it increased after 1981, remained well below the level of government welfare funding in western European states like Germany, France and Britain (see Section 23.5(c) for later developments).

23.2 RACIAL PROBLEMS AND THE CIVIL RIGHTS MOVEMENT

(a) The government's attitude changes

As we saw earlier (Section 22.5), African Americans were still being treated as second-class citizens right up to the Second World War. Even when American troops were

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travelling aboard the *Queen Mary* to fight in Europe, blacks and whites were segregated – blacks had to travel in the depths of the ship near the engine room, well away from the fresh air. However, the attitude of the nation's leaders was changing. In 1946 President Truman appointed a committee to investigate civil rights. It recommended that Congress should pass laws to stop racial discrimination in jobs and to allow blacks to vote. *What caused this change of heart?* The committee itself gave several reasons:

1 Some politicians were worried by their consciences; they felt that it was not morally right to treat fellow human beings in such an unfair way.
2 Excluding black people from top jobs was a waste of talent and expertise.
3 It was important to do something to calm the black population, who were becoming more outspoken in their demands for civil rights.
4 The USA could hardly claim to be a genuinely democratic country and leader of the 'free world' when 10 per cent of its population were denied voting and other rights. This gave the USSR a chance to condemn the USA as 'a consistent oppressor of underprivileged peoples'. The American government wanted that excuse removed.
5 Nationalism was growing rapidly in Asia and Africa. Non-whites in India and Indonesia were on the point of gaining independence. These new states might turn against the USA and towards communism if American whites continued their unfair treatment of blacks.

Over the next few years, during the Eisenhower presidency, the government and the Supreme Court introduced *new laws to bring about racial equality.*

- Separate schools for blacks and whites were illegal and unconstitutional; some black people had to be included on all juries (1954).
- Schools must be desegregated 'with all deliberate speed'; this meant that black children had to attend white schools, and vice versa.
- The 1957 Civil Rights Act set up a commission to investigate the denial of voting rights to black people.
- The 1960 Civil Rights Act provided help for blacks to register as voters; but this was not very effective, since many were afraid to register for fear of being harassed by whites.

Unfortunately laws and regulations were not always carried out. For example, whites in some Southern states refused to carry out the school desegregation order. In September 1957, when Governor Faubus of Arkansas defied a Supreme Court order by refusing to desegregate schools, President Eisenhower sent federal troops to escort nine black children into the High School at Little Rock. They were greeted outside the school by a mob of protesters who at first refused to move. The troops had to disperse them at bayonet point; the nine students entered the school escorted by 22 armed guards, who took them home again after school. The escort continued for several months afterwards. This was a symbolic victory, but Southern whites continued to defy the law, and by 1961 only 25 per cent of schools and colleges in the South were desegregated. In 1961 the Governor of Mississippi refused the application of a black student, James Meredith, to the all-white state university; he was eventually accepted the following year.

(b) Dr Martin Luther King and the non-violent campaign for equal rights

In the mid-1950s a mass Civil Rights movement developed. *This happened for a number of reasons*:

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- By 1955 a larger proportion of black people lived in the North than was the case earlier. In 1900 almost 90 per cent of all blacks lived in the Southern states, working on the plantations. By 1955 almost 50 per cent lived in Northern industrial cities, where they became more aware of political issues. A prosperous black middle class developed which produced talented leaders.
- As Asian and African states such as India and Ghana gained their independence, African Americans resented their own unfair treatment more than ever.
- Black people, whose hopes had been raised by Truman's committee, grew increasingly impatient at the slow pace and the small amount of change. Even the small advances they made aroused intense hostility among many Southern whites; the Ku Klux Klan revived and some Southern state governments banned the National Association for the Advancement of Colored People (NAACP). It was obvious that only a nationwide mass movement would have any effect.

The campaign took off in 1955 when *Dr Martin Luther King* (see Illus. 23.2), a Baptist minister, emerged as the outstanding leader of the non-violent Civil Rights movement. After a black woman, Rosa Parks, had been arrested for sitting in a seat reserved for whites on a bus in Montgomery, Alabama, a boycott of all Montgomery buses was organized. King soon found himself the chief spokesman for the boycott; as a committed Christian, he insisted that the campaign must be peaceful:

> Love must be our regulating ideal. If you will protest courageously, and yet with dignity and Christian love, when the history books are written in future generations, historians

Illustration 23.2 **Dr Martin Luther King**

> will have to say 'there lived a great people – a black people – who injected new dignity into the veins of civilization'.

White segregationalists responded with violence: bombs exploded in four black churches and Martin Luther King's house. The black people of Montgomery refused to be intimidated. The campaign continued and in November 1956 its goal was achieved: segregated seating was stopped on Montgomery buses. Soon afterwards the Supreme Court ruled that any segregation on public buses was unconstitutional. This was just a beginning: in 1957 the Southern Christian Leadership Conference (SCLC) was founded and King was elected as its president. Its aim was to achieve full black equality by non-violent methods. In the summer of 1957 King launched a moral reform campaign, emphasizing that if black people wished to have complete equality with whites, they must 'seek to gain the respect of others by improving on [their] shortcomings'. In a series of sermons all over the South, he criticized what some whites called 'bad niggers', meaning those who were lazy, promiscuous, slovenly, drunken, ignorant and downright criminal. Only when such people had undergone 'a process of self-purification' to produce 'a calm and loving dignity befitting good citizens', could all black people become fully equal.

The campaign of sit-ins and peaceful disobedience reached a climax in 1963 when King organized successful demonstrations against segregation in Birmingham, Alabama. The police used tear gas, clubs, dogs and water-hoses against the demonstrators, and King was arrested and briefly imprisoned. Although the campaign had attracted world attention and sympathy, and some progress had been made, there was still a long way to go before black people could enjoy equal rights with whites. The Kennedy government was sympathetic to black aspirations but was desperately trying to keep the campaign peaceful, which was becoming more difficult. As Howard Zinn points out, how could you expect blacks to remain peaceful

> when bombs kept exploding in churches, when new 'civil rights' laws did not change the root condition of black people. In the spring of 1963, the rate of unemployment for whites was 4.8 percent. For nonwhites it was 12.1 percent. According to government estimates, one-fifth of the white population was below the poverty line, and one-half of the black population was below that line. The civil rights bills emphasized voting, but voting was not a fundamental solution to racism or poverty. In Harlem, blacks who had voted for years, still lived in rat-infested slums.

A huge march on Washington was organized for August 1963, to protest at the failure to solve the problem. About a quarter of a million people, both black and white, gathered to listen to the speakers, and it was here that Martin Luther King made one of his most moving speeches. He talked about his dream of a future America in which everybody would be equal:

> I have a dream that my four little children will one day live in a nation where they will not be judged by the colour of their skin, but by the content of their character.

In 1964 King was awarded the Nobel Peace Prize. But not everything he attempted was successful. In 1966 when he led a campaign against segregated housing in Chicago, he came up against bitter white opposition and could make no progress.

King admitted that the achievements of the Civil Rights movement had not been as dramatic as he had hoped. Together with the SCLC he began the Poor People's Campaign in 1967, which aimed to alleviate poverty among black people and other disadvantaged groups such as American Indians, Puerto Ricans, Mexicans and even poor whites. They aimed to present a bill of economic rights to Congress. King also launched himself into

criticism of the Vietnam War, and this upset President Johnson, who had been sympathetic to the civil rights campaign, as well as losing him some of his support among the whites. The FBI began to harass him, but he was undeterred. Still insisting on non-violence, he decided that the way forward was to have huge demonstrations lasting over a period, and was planning what he called a Poor People's Encampment to be set up in Washington to act as a permanent reminder to the government. However, tragically, in April 1968, King was assassinated by a white man, James Earl Ray, in Memphis, Tennessee, where he had gone to support a strike of refuse workers.

Dr Martin Luther King is remembered as probably the most famous of the black civil rights leaders. He was a brilliant speaker and the fact that he emphasized non-violent protest gained him much support and respect even among whites. He played a major part in the achievement of civil and political equality for black people, although, of course, others also made valuable contributions. He was not much involved, for example, in the campaign to desegregate education. He was fortunate that the presidents he had to deal with – *Kennedy (1961–3) and Johnson (1963–9) – were both sympathetic to the Civil Rights movement*. Kennedy admitted in 1963 that an African American had

> half as much chance of completing high school as a white, one-third as much chance of completing college, twice as much chance of becoming unemployed, one-seventh as much chance of earning $10,000 dollars a year, and a life expectancy which is seven years less.

Kennedy showed his good intentions by appointing the USA's first black ambassador and by presenting a Civil Rights Bill to Congress. This was delayed at first by the conservative Congress but passed in 1964 after a debate lasting 736 hours. It was a far-reaching measure: it guaranteed the vote for blacks and made racial discrimination in public facilities (such as hotels, restaurants and shops) and in jobs illegal. Again the Act was not always carried out, especially in the South, where black people were still afraid to vote.

Johnson introduced *the Voting Rights Act (1965)* to try to make sure that black people exercised their right to vote. He followed it up with another *Civil Rights Act (1968)*, which made it illegal to discriminate in selling property or letting accommodation. Again there was bitter white hostility to these reforms, and the problem was to make sure that the Acts were carried out.

(c) The Black Muslims

Although progress was being made, many African Americans were impatient with the slow pace and began to look for different approaches to the problem. *Some black people converted to the Black Muslim faith* – a sect known as *Nation of Islam*, arguing that Christianity was the religion of the racist whites. They believed that black people were the superior race, and that whites were evil. One of the movement's best known leaders was *Malcolm X* (formerly Malcolm Little), whose father had been murdered by the Ku Klux Klan. He was a charismatic speaker and a good organizer; he dismissed the idea of racial integration and equality and claimed that the only way forward was black pride, black self-dependence and complete separation from the whites. He became extremely popular, especially among young people, and the movement grew. Its most famous convert was the world heavyweight boxing champion Cassius Clay, who changed his name to Muhammad Ali.

Malcolm X came into conflict with other Black Muslim leaders, who began to look on him as a fanatic because of his willingness to use violence. In 1964 he left the Nation of Islam and started his own organization. However, later that year his views began to

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change: after a pilgrimage to Mecca, he became more moderate, acknowledging that not all whites were evil. In October 1964 he converted to orthodox Islam and began to preach about the possibility of peaceful black/white integration. Tragically, the hostility between Malcolm X's movement and Nation of Islam exploded into violence, and in February 1965 he was shot dead by a group of Black Muslims in Harlem.

(d) Violent protest

More militant organizations included the Black Power movement and the Black Panther Party. *The Black Power movement* emerged in 1966 under the leadership of *Stokeley Carmichael.* He was a West Indian who had moved to the USA in 1952 and became a strong supporter of Martin Luther King. However, he was outraged by the brutal treatment suffered by civil rights campaigners at the hands of the Ku Klux Klan and other whites. The Black Power movement encouraged robust self-defence and self-determination, and 1967 saw probably the worst urban riots in American history. A total of 83 people were shot dead and hundreds were injured, the vast majority of whom were black civilians. In 1968 Carmichael began to speak out against American involvement in the Vietnam War; when he returned to the USA after a trip abroad, his passport was confiscated. He decided he could no longer live under such a repressive system; in 1969 he left the country and went to Guinea, in West Africa, where he lived until his death in 1998.

The Black Panther Party for Self-defence was founded in 1966 in Oakland, California, by *Huey Newton, Leroy Eldridge Cleaver and Bobby Searle.* Its original aim, as its name implies, was to protect people in the black ghettos from police brutality. Eventually the party became more militant and developed into a Marxist revolutionary group; *their programme included*:

- the arming of all black people;
- the exemption of blacks from military service;
- the release of all blacks from jail;
- payment of compensation to blacks for all the years of ill-treatment and exploitation by white Americans;
- practical on-the-spot help with social services for black people living below the poverty line.

They used the same methods against white people as the Ku Klux Klan had used for years against black people – arson, beatings and murders. In 1964 there were race riots in Harlem (New York) and in 1965 the most severe race riots in American history took place in the Watts district of Los Angeles; 35 people were killed and over a thousand injured. The police harassed the Panthers unmercifully, so much so that Congress ordered an investigation into their conduct. By the mid-1970s the Panthers had lost many of their leading activists, who had either been killed or were in prison. This, plus the fact that most non-violent black leaders felt that the Panthers were bringing the whole Civil Rights movement into disrepute, caused them to change tactics and concentrate on the social service aspects of their activities. By 1985 the Panthers had ceased to exist as an organized party.

(e) Mixed fortunes

By that time great progress had been made, especially in the area of voting; by 1975 there were 18 black members of Congress, 278 black members of state governments, and 120 black mayors had been elected. However, there could never be full equality until black

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poverty and discrimination in jobs and housing were removed. Unemployment was always higher among black people; in the big Northern cities they were still living in overcrowded slum areas known as *ghettos*, from which the whites had moved out; and a large proportion of the jail population was black. *In the early 1990s, most black Americans were worse off economically than they had been 20 years earlier.* The underlying tensions broke out in the spring of 1992 in Los Angeles: after four white policemen were acquitted of beating up a black motorist (in spite of the incident having been caught on video), crowds of black people rioted. Many were killed, thousands were injured, and millions of dollars worth of damage was done to property.

Yet at the same time, a prosperous African American middle class had emerged, and talented individuals were able to make it to the top. The best example was Colin Powell, whose parents had moved to New York from Jamaica. He had a successful career in the army and in 1989 was appointed chairman of the Joint Chiefs of Staff, the first African American to reach the highest position in the US military. In the Gulf War of 1990–1 he commanded the UN forces with distinction. After his retirement in 1993 he became involved in politics; both parties hoped he would join them, but he eventually declared himself a Republican. There was talk that he might run for president in the elections of 2000, but he chose not to. In January 2001, George W. Bush appointed him secretary of state, the US head of foreign affairs. Again he was the first African American to occupy such a vitally important post.

In 2003 it was reported that, because of higher birth rates and immigration, Hispanics or Latinos had become the largest minority group in the USA, making up 13 per cent of the total population; with a total of 37 million they had overtaken African Americans, who totalled 36.2 million (12.7 per cent). At the same time, the birth rate among the white population was falling. Demographers pointed out that if these trends continued, the political parties would be forced to take more account of the wishes and needs of both Latinos and black Americans. In the presidential election of 2000, more than 80 per cent of African American voters backed the Democrats, while in the 2002 mid-term elections, about 70 per cent of Latinos voted Democrat. In 2009 the Democrat candidate, Barack Obama, became the first African American president of the USA.

23.3 ANTI-COMMUNISM AND SENATOR MCCARTHY

(a) Anti-communist feeling

After the Second World War the USA took upon itself the world role of preventing the spread of communism; this caused the country to become deeply involved in Europe, Korea, Vietnam, Latin America and Cuba (see Chapters 7, 8, 21 and 26). There had been a strong anti-communist movement in the USA ever since the communists had come to power in Russia in 1917. In a way this is surprising, because the American Communist Party (formed in 1919) attracted little support. Even during the depression of the 1930s, when a mass swing to the left might have been expected, party membership was never more than 100 000, and there was never a real communist threat.

Some US historians argue that Senator Joseph McCarthy and other right-wingers who whipped up anti-communist feelings were trying to protect what they saw as the traditional American way of life, with its emphasis on 'self-help' and 'rugged individualism'. They thought that this was being threatened by the rapid changes in society, and by developments like the New Deal and the Fair Deal, which they disliked because they were financed by higher taxation. Many were deeply religious people, some of them fundamentalists, who wanted to get back to what they called 'true Christianity'. It was difficult for them to pinpoint exactly who was responsible for this American 'decline', and so they

focused on communism as the source of all evil. The spread of communism in eastern Europe, the beginning of the Cold War, the communist victory in China (1949) and the attack on South Korea by communist North Korea (June 1950) threw the 'radical right' into a panic.

1 Troop demobilization

The rapid demobilization of American troops at the end of the war worried some people. The general wish was to 'bring the boys home' as soon as possible, and the army planned to have 5.5 million soldiers back home by July 1946. However, Congress insisted that it should be done much more quickly, and that the army should be dramatically reduced in size. By 1950 it was down to only 600 000 men, none of them fully prepared for service. This thoroughly alarmed the people, who thought that the USA should be ready to take deterrent action against communist expansion.

2 Fear of espionage

Reports of espionage (spying) prompted Truman to set up a *Loyalty Review Board* to investigate people working in the government, the civil service, atomic research and armaments (1947). During the next five years, over 6 million people were investigated; no cases of espionage were discovered, though about 500 people were sacked because it was decided that their loyalty to the USA was 'questionable'.

3 Alger Hiss and the Rosenbergs

Much more sensational were the cases of Alger Hiss and Julius and Ethel Rosenberg. Hiss, a former top official in the State Department (the equivalent of the British Foreign Office), was accused of being a communist and of passing secret documents to Moscow. He was eventually found guilty of perjury and given a five-year jail sentence (1950). The Rosenbergs were convicted of passing secret information about the atomic bomb to the Russians, though much of the evidence was doubtful. They were sentenced to death in the electric chair. They were eventually executed in 1953, in spite of worldwide appeals for mercy.

These cases helped to intensify the anti-communist feeling sweeping America, and led Congress to pass *the McCarran Act*, which required organizations suspected of being communist to supply lists of members. Many of these people were later sacked from their jobs, although they had committed no offence. Truman, who felt that things were going too far, vetoed this Act, but Congress passed it, over his veto.

4 McCarthyism

Senator Joseph McCarthy was a right-wing Republican who hit the headlines in 1950 when he claimed (in a speech at Wheeling, West Virginia, on 9 February) that the State Department was 'infested' with communists. He claimed to have a list of 205 people who were members of the Party and who were 'still working and shaping policy'. Although he could produce no evidence to support his claims, many people believed him, and he launched a campaign to root out the communists. All sorts of people were accused of being communists: socialists, liberals, intellectuals, artists, pacifists and anyone whose views did not appear orthodox were attacked and hounded out of their jobs for 'un-American activities'.

McCarthy became the most feared man in the country, and was supported by many national newspapers. McCarthyism reached its climax soon after Eisenhower's election. McCarthy won many votes for the Republicans among those who took his accusations seriously, but he went too far when he began to accuse leading generals of having communist sympathies. Some of the hearings were televised and many people were shocked at the brutal way in which he banged the table with rage and abused and bullied witnesses. Even

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Republican senators felt he was going too far, and the Senate condemned him by 67 votes to 22 (December 1954). McCarthy foolishly attacked the president for supporting the Senate, but this finally ruined his reputation and McCarthyism was finished. But it had been an unpleasant experience for many Americans: at least 9 million people had been 'investigated', thousands of innocent people had lost their jobs, and an atmosphere of suspicion and insecurity had been created.

5 After McCarthy

Right-wing extremism continued even after the disgrace of McCarthy. Public opinion had turned against him not because he was attacking communists, but because of his brutal methods and because he had overstepped the mark by criticizing generals. Anti-communist feeling was still strong and Congress passed an Act making the Communist Party illegal (1954). There were also worries in case communism gained a foothold in the countries of Latin America, especially after Fidel Castro came to power in Cuba in 1959, and began nationalizing American-owned estates and factories. In response, Kennedy launched *the Alliance for Progress (1961)*, which aimed to pump billions of dollars of aid into Latin America to enable economic and social reform to be carried out. Kennedy did genuinely want to help the poor nations of Latin America, and American aid was put to good use. But other motives were important too.

- By helping to solve economic problems, the USA hoped to reduce unrest, making it less likely that communist governments would come to power in these states.
- US industry would benefit, because it was understood that much of the cash would be spent buying American goods (see Chapter 26 for full details).

(b) The military–industrial complex

Another by-product of the Cold War was what President Eisenhower called the 'military–industrial complex'. This was the situation in which the American military leaders and armaments manufacturers worked together in a partnership. The army chiefs decided what was needed, and as the arms race developed, more and more orders were placed – atomic bombs, then hydrogen bombs, and later many different types of missile (see Section 7.4). Armaments manufacturers made huge profits, though nobody was quite sure just how much, because all the dealings were secret. *It was in their interests to keep the Cold War going* – the more it intensified, the greater their profits. When the Russians launched the first space satellite (Sputnik) in 1957, Eisenhower set up *the National Aeronautics and Space Administration (NASA)*, and even more expensive orders were placed.

At any sign of a possible improvement in East–West relations, for example when Khrushchev talked about 'peaceful coexistence', the armaments manufacturers were far from happy. Some historians have suggested that the American U-2 spy plane that was shot down over Russia in 1960 was sent deliberately in order to ruin the summit conference, which was about to begin in Paris (see Section 7.3(c)). If true, this would mean that the military–industrial partnership was even more powerful than the super-corporations – so powerful that it was able to influence American foreign policy. The amounts of cash involved were staggering: in 1950 the total budget was around $40 billion, of which $12 billion was military spending. By 1960 the military budget was almost $46 billion, and that was half the country's total budget. By 1970, military spending had reached $80 billion. A Senate report found that over 2000 former top officers were employed by defence contractors, who were all making fortunes.

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23.4 NIXON AND WATERGATE

Richard M. Nixon (1969–74) was Eisenhower's vice-president from 1956, and had narrowly lost to Kennedy in the 1960 election. On his election in 1969 he faced an unenviable task – what to do about Vietnam, poverty, unemployment, violence and the general crisis of confidence that was afflicting America (see Section 23.1(e) for his social policies).

(a) Foreign policy

Overseas problems, especially Vietnam, dominated his presidency (at least until 1973 when Watergate took over). After the Democrat majority in Congress refused to vote any further cash for the war, Nixon extricated the USA from Vietnam with a negotiated peace signed in 1973 (see Section 8.3(c)), to the vast relief of most of the American people, who celebrated 'peace with honour'. Yet in April 1975, South Vietnam fell to the communists; the American struggle to prevent the spread of communism in south-east Asia had ended in failure, and her world reputation was somewhat tattered.

However, *Nixon was responsible for a radical and constructive change in foreign policy* when he sought, with some success, to improve the USA's relations with the USSR and China (see Section 8.6(a–c)). His visit to meet Chairman Mao in Beijing in February 1972 was a brilliant success; in May 1972 he was in Moscow for the signing of an arms limitation treaty.

By the end of his first term in office, Nixon's achievements seemed full of promise: he had brought the American people within sight of peace, he was following sensible policies of détente with the communist world, and law and order had returned. The Americans had enjoyed a moment of glory by putting the first men on the moon (Neil Armstrong and Ed 'Buzz' Aldrin, 20 July 1969). Nixon won the election of November 1972 overwhelmingly, and in January 1973 was inaugurated for a second term. However, his second term was ruined by a new crisis.

(b) The Watergate scandal

The scandal broke in January 1973 when a number of men were charged with having broken into the Democratic Party offices in the Watergate Building, Washington, in June 1972 during the presidential election campaign. They had planted listening devices and photocopied important documents. It turned out that the burglary had been organized by leading members of Nixon's staff, who were sent to jail. Nixon insisted that he knew nothing about the affair, but suspicions mounted when he consistently refused to hand over tapes of discussions in the White House which, it was thought, would settle matters one way or the other. The president was widely accused of having deliberately 'covered up' for the culprits. He received a further blow when his vice-president, Spiro Agnew, was forced to resign (December 1973) after facing charges of bribery and corruption. He was replaced by Gerald Ford, a little-known politician, but one with an unblemished record.

Nixon was called on to resign, but refused even when it was discovered that he had been guilty of tax evasion. He was threatened with *impeachment* (a formal accusation of his crimes before the Senate, which would then try him for the offences). To avoid this, Nixon resigned (August 1974) and Ford became president. It was a tragic end to a presidency which had shown positive achievements, especially in foreign affairs, but the scandal shook people's faith in politicians and in a system which could allow such things to happen. Ford won admiration for the way in which he restored dignity to American

politics, but given the recession, unemployment and inflation, it was no surprise when he lost the 1976 election to the Democrat James Earl Carter.

23.5 THE CARTER–REAGAN–BUSH ERA, 1977–93

(a) Jimmy Carter (1977–81)

Carter's presidency was something of a disappointment. He was elected as an outsider – ex-naval officer, peanut farmer, ex-Governor of Georgia, and a man of deep religious convictions; he was the newcomer to Washington who would restore the public's faith in politicians. *He managed some significant achievements. He*

- stopped giving American aid to authoritarian right-wing governments merely to keep communism out;
- co-operated with Britain to bring about black majority rule in Zimbabwe (see Section 24.4(c));
- signed a second Strategic Arms Limitation Treaty (SALT II) with the USSR in 1979;
- played a vital role in the Camp David talks, bringing peace between Egypt and Israel (see Section 11.6).

Unfortunately Carter's lack of experience of handling Congress meant that he had the same difficulties as Kennedy, and he failed to pilot the majority of his reforming programme into law. By 1980 the world recession was biting deeply, bringing factory closures, unemployment and oil shortages. He was a great disappointment to the Christian conservatives, many of whom had voted for him. They expected him to support their call for the banning of abortion and for making prayers a compulsory part of education in state schools, neither of which materialized. Apart from Camp David, Democratic foreign policy seemed unimpressive; even an achievement like SALT II was unpopular with the military leaders and the arms manufacturers, since it threatened to reduce their profits. The Christian Right saw it as a capitulation to ungodly communism. The Americans were unable to take effective action against the Russian occupation of Afghanistan (1979). Just as frustrating was their failure to free a number of American hostages seized in Tehran by Iranian students (November 1979) and held for over a year. The Iranians were trying to force the American government to return the exiled Shah and his fortune, but stalemate persisted even after the Shah's death. A combination of these problems and frustrations resulted in a decisive Republican victory in the election of November 1980. Ironically the hostages were set free minutes after the inauguration of Carter's successor (January 1981).

(b) Ronald Reagan (1981–9)

Reagan, a former film star, quickly became the most popular president since the Second World War. He was a reassuring, kindly father-figure who won a reputation as 'The Great Communicator' because of his straightforward and simple way of addressing the American public. *Americans particularly admired his determination to stand no nonsense from the Soviets* (as he called the USSR); he wanted to work for peaceful relations with them, but from a position of strength. He persuaded Congress to vote extra cash to build MX intercontinental ballistic missiles (May 1983) and deployed Cruise and Pershing missiles in Europe (December 1983). He intervened in Central America, sending financial and military aid to rebel groups in El Salvador and Nicaragua (see Section 26.3(c)), whose

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governments he believed to be communist-backed. He continued friendly relations with China, visiting Beijing in April 1984, but he did not meet any top Russian politicians until shortly before the presidential election of November 1984.

On the home front, Reagan brought with him some new ideas about how to run the economy. He believed that the way to restore US greatness and prosperity was by applying what was known as 'supply-side economics'. This was the theory that by lowering taxes, the government would actually draw in more revenue. Lower taxes would mean that both firms and individual consumers were left with more cash to spend on investment and on buying goods. This would encourage people to work harder, creating greater demand for goods and therefore more jobs, and this in turn would save expenditure on unemployment and welfare benefits. All this extra economic activity would produce more tax revenue for the government. Reagan was greatly impressed by the theories of American economist Milton Friedman and Friedrich Hayek, an Austrian who had set out his New Right economic ideas in his book *The Road to Serfdom*, first published in 1944. Their 'monetarist' theories opposed socialism and the welfare state on the grounds that they involved too much government interference and regulation. They argued that people should be free to run their own lives and businesses with a minimum of government regulation. Reagan's policies – 'Reaganomics', as they became known – were based on these theories. 'Government is not the solution to our problems,' he told the nation; 'government *is* the problem.' Consequently he aimed to remove restrictions on business, to reduce government spending on welfare (though not on defence), to balance the federal budget, to introduce a free-market economy, and to control the money supply in order to keep inflation low.

Unfortunately the 'Reagan revolution' got off to a bad start. For the first three years the government failed to balance the budget, partly because of a significant increase in defence spending. The 'supply-side' stimulus failed to work, the economy went into recession and unemployment rose to 10 per cent – some eleven million people were out of work. Government expenditure on welfare was inadequate at the time of greatest need, there was an adverse trade balance and the budget deficit, though not exactly out of control, was certainly enormous.

The economy began to recover in 1983 and continued to grow for the next six years. The recovery started in time for the presidential election of November 1984. Reagan could claim that his policies were working, though his critics pointed out that government spending had actually increased in all major areas including welfare and social security. The national debt had increased massively, while investment had declined. In fact the recovery had taken place *in spite of* 'Reaganomics'. Another criticism levelled at the government was that its policies had benefited the rich but increased the tax burden on the poor. According to Congressional investigations, taxes took only 4 per cent of the income of the poorest families in 1978, but over 10 per cent in 1984. In April 1984 it was calculated that, thanks to successive Reagan budgets since 1981, the poorest families had gained an average of $20 a year from tax cuts, but had lost $410 a year in benefits. On the other hand, households with the highest incomes (over $80 000 a year) had gained an average of $8400 from tax cuts and lost $130 in benefits. One of the 'supply-side' economists' most attractive predictions – that the new wealth would 'trickle down' to the poor – had not been fulfilled.

Reagan nevertheless retained his popularity with the vast majority of Americans and *won a sweeping victory in the presidential election of November 1984* over his Democratic rival, Walter Mondale, who was portrayed by the media, probably unfairly, as an unexciting and old-fashioned politician with nothing new to offer. Reagan took 59 per cent of the popular vote; at 73, he was the oldest person ever to be president.

During his second term in office, everything seemed to go wrong for him. He was dogged by economic problems, disasters, scandals and controversies.

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1 Economic problems

- *Congress became increasingly worried by the rapidly growing federal budget deficit.* The Senate rejected Reagan's 1987 budget for increased defence spending at a time when they felt it was vital to reduce the deficit. Senators also complained that the cash allowed for Medicare would be 5 per cent short of the amount needed to cover rising medical costs. In the end, Reagan was forced to accept a cut in defence spending of around 8 per cent, and to spend more than he wanted on social services (February 1986).
- *There was a serious depression in the agricultural Midwest*, which brought falling prices, falling government subsidies and rising unemployment.

2 Disasters in the space programme

1986 was a disastrous year for America's space programme. The space shuttle *Challenger* exploded only seconds after lift-off, killing all seven crew members (January). A Titan rocket carrying secret military equipment exploded immediately after lift-off (April), and in May a Delta rocket failed, the third successive failure of a major space launch. This seemed likely to delay for many years Reagan's plans to develop a permanent orbital space station.

3 Foreign policy problems

- *The bombing of Libya (April 1986) provoked a mixed reaction.* Reagan was convinced that Libyan-backed terrorists were responsible for numerous outrages, including bomb attacks at Rome and Vienna airports in December 1985. After Libyan missile attacks on US aircraft, American F-111 bombers attacked the Libyan cities of Tripoli and Benghazi, killing 100 civilians. While the attack was widely applauded in most circles in the USA, world opinion on the whole condemned it as an overreaction.
- *American policy towards South Africa caused a row between president and Congress.* Reagan wanted only limited sanctions but Congress was in favour of a much stronger package to try to bring an end to apartheid, and they succeeded in overturning the president's veto (September 1986).
- The Reykjavik meeting with President Gorbachev of the USSR (October 1986) left the feeling that Reagan had been outmanoeuvred by the Soviet leader. However, failure turned to success in October 1987 with the signing of the INF (intermediate nuclear forces) Treaty (see Section 8.6(b)).

Growing dissatisfaction with the government was reflected in the mid-term Congressional elections (November 1986), when the Republicans lost many seats, leaving the Democrats with an even larger majority in the House of Representatives (260–175), and more important, now in control of the Senate (54–45). With two years of his second term still to go, Reagan was a 'lame-duck' president – a Republican faced with a Democrat Congress. He would have the utmost difficulty persuading Congress to vote him cash for policies such as Star Wars (which most Democrats thought impossible) and aid for the Contra rebels in Nicaragua; and under the Constitution, a two-thirds majority in both houses could overrule the president's veto.

4 The Irangate scandal

This was the most damaging blow to the president. Towards the end of 1986, it emerged that *the Americans had been supplying arms secretly to Iran in return for the release of*

hostages. However, Reagan had always insisted publicly that the USA would never negotiate with governments which condoned terrorism and the taking of hostages. Worse still, it emerged that profits from the Iranian arms sales were being used to supply military aid to the Contra rebels in Nicaragua; this was illegal, since Congress had banned all military aid to the Contras from October 1984.

A Congressional investigation found that a group of Reagan's advisers, including his national security chief Donald Regan, Lieutenant-Colonel Oliver North and Rear-Admiral John Poindexter had been responsible and had all broken the law. Reagan accepted responsibility for the arms sales to Iran but not for sending funds to the Contras. It seems that he was only dimly aware of what was going on, and was probably no longer in touch with affairs. 'Irangate', as it was dubbed, did not destroy Reagan, as Watergate did Nixon, but it certainly tarnished the administration's record in its last two years.

5 A severe stock market crash (October 1987)

This was brought on by the fact that the American economy was in serious trouble. There was a huge budget deficit, mainly because Reagan had more than doubled defence spending since 1981, while at the same time cutting taxes. During the period 1981–7, the national debt had more than doubled – to $2400 billion, and borrowing had to be stepped up simply to pay off the massive annual interest of $192 billion. At the same time the USA had the largest trading deficit of any leading industrialized country, and the economy was beginning to slow down as industry moved into recession. Some sources claimed that spending cuts had left economic infrastructures and inner cities in a state of decay; apparently in some of the worst areas, housing and infant mortality were on the same level as some Third World black spots. On the other hand statistics from the Federal Reserve Bank told a more positive story. During the eight years that Reagan was in office, inflation dropped from 12 percent to 4.5 percent, unemployment fell from 7.5 percent to 5.7 percent, the top rate of personal tax fell from 70 percent to 33 percent, and 18 million new jobs were created. Certainly Reagan somehow managed to retain his personal popularity. During 1988 the economy and the balance of payments improved and unemployment fell. This enabled the Republican George Bush to win a comfortable victory in the election of November 1988.

(c) George Bush (1989–93)

George Bush, who had been Reagan's vice-president, scored *a big foreign policy success with his decisive leadership against Saddam Hussein* after the Iraqi invasion of Kuwait (August 1990). When the Gulf War ended in the defeat of Saddam, Bush's reputation stood high (see Section 11.10). However, as time passed, he was increasingly criticized for not having pressed home the advantage and for allowing the brutal Saddam to remain in power.

Meanwhile all was not well at home: the legacy of Reaganomics was not easy to throw off. A recession began in 1990, the budget deficit was still growing, and unemployment increased again. During the election campaign Bush had promised, in a famous reply to the Democrat candidate Michael Dukakis, not to raise taxes: 'Read my lips; no new taxes.' But now he found himself forced to raise indirect taxes and reduce the number of wealthy people exempt from tax. Although people with jobs were comfortably off materially, the middle classes felt insecure in the face of the general trend towards fewer jobs. Among the working classes there was a permanent 'underclass' of unemployed people, both black and white, living in decaying inner-city ghettos with a high potential for crime, drugs and violence. Many of these people were completely alienated from politics and politicians, seeing little chance of help from either party. It was in this atmosphere that the election of November 1992 brought a narrow victory for the Democrat Bill Clinton.

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23.6 BILL CLINTON, GEORGE W. BUSH AND BARACK OBAMA

(a) Bill Clinton (1993–2001)

William J. Clinton, like John F. Kennedy 30 years earlier and Franklin D. Roosevelt 60 years earlier, came into the White House like a breath of fresh air. He had been a Rhodes Scholar at Oxford, and the youngest ever Governor of Arkansas, elected in 1978 at the age of 32. As president he immediately caused a stir by appointing more women to top posts in his administration than had ever been seen before. Madeleine Albright became the first woman secretary of state; a woman judge was appointed to the Supreme Court, and three other important positions were given to women.

In the presidential election, Clinton had campaigned on a programme of welfare reform and a system of universal health insurance, together with a change in direction – away from 'Reaganomics'. Unfortunately he experienced the same problems as Kennedy – how to persuade or manoeuvre the Republicans in Congress into approving his reforms. When his Health Security Bill was published, it was attacked by the insurance industry and the American Medical Association, and Congress refused to pass it. His task became even more difficult after big Republican gains in the Congressional elections of 1994. However, the uncompromising behaviour of some of the Republicans in Congress did not go down well with ordinary Americans, and Clinton's popularity increased. He did have some successes:

- Plans were introduced to reduce the huge budget deficit left over from the Reagan era.
- A complete reorganization and streamlining of the welfare system was begun.
- A minimum wage of $4.75 an hour was introduced (May 1996), and this was to increase to $5.15 in May 1997.
- The North American Free Trade Agreement was signed with Canada and Mexico, setting up a free trade area between the three states.

Clinton could also point to some solid achievements in foreign affairs. He made a positive contribution to peace in the Middle East when he brought Israeli and Palestinian leaders together in Washington in 1993; the eventual result was an agreement granting the Palestinians limited self-government in the Gaza Strip and Jericho (see Section 11.7). In 1995 he worked with President Yeltsin of Russia to try to bring an end to the war in Bosnia, the outcome being the Dayton Accords (see Section 10.7(c)).

At the same time his presidency was dogged by rumours of shady business deals which he and his wife Hillary were said to have been involved in while he was Governor of Arkansas – the so-called 'Whitewater scandal'. When two of his former business associates and the current Governor of Arkansas were convicted of multiple fraud (May 1996), the Republicans hoped that Whitewater would do to Clinton what Watergate did to Nixon – drive him from office, or at least help to bring about his defeat in the election of November 1996. However, what seemed to matter to a majority of the American people was the state of the economy; and here too Clinton was successful – *the economy began to recover and the budget deficit was reduced to more manageable proportions.* The confrontational tactics of some of the Republicans, particularly Newt Gingrich, who constantly held up Clinton's measures in Congress, probably won him sympathy, so that he was comfortably re-elected.

The great success story of Clinton's second term was the sustained economic growth, which by 1999 had set a new record for the longest period of continuous economic expansion in peacetime. Already in 1998 the budget had been balanced and there was a surplus

for the first time since 1969. Other signs of the healthy economy were that the value of the stock market tripled, there was the lowest unemployment rate for almost 30 years, and the highest level of home ownership in the nation's history.

(b) Scandal and impeachment

Rumours of financial and sexual improprieties constantly circulated during Clinton's first term as president. The attorney-general could not avoid giving the go-ahead for an investigation into the Clintons' business affairs in Arkansas. The enquiry became known as 'Whitewater', after the housing development company at the centre of the controversy; although it dragged on for several years, no conclusive evidence was found of any illegal dealings. Determined to discredit the president somehow or other, Kenneth Starr, the man conducting the enquiry, extended his investigations and eventually discovered proof that Clinton had been having an affair with Monica Lewinsky, a young intern on the White House staff. Having repeatedly denied any such involvement, the president was forced to make a public apology to the American people. The House of Representatives voted to impeach Clinton on charges of perjury and obstruction of justice, but in 1999 the Senate found him not guilty. It was a sordid business which to some extent damaged Clinton's reputation. On the other hand, his personal popularity remained high; he had achieved a great deal during his presidency, and there was a feeling that he had been the victim of unreasonable harassment at the hands of some Republicans.

(c) The election of November 2000

The presidential election brought surprises, in more ways than one. The Democrat candidate, Al Gore (Clinton's vice-president), started out the favourite in the contest against George W. Bush (Governor of Texas and son of the former president). Yet in spite of the healthy economic situation, the voting was very close. In total votes cast over the nation as a whole, Gore beat Bush by over 500 000. But the final result depended on which candidate won Florida, the last state to declare. Florida had 25 electoral votes, and this meant that whoever won in Florida would become president. After a recount, it looked as though Bush had won, though with a majority of less than 1000. The Democrats challenged the result and demanded a manual recount on the grounds that the machine counts were not reliable. The Florida Supreme Court ordered a manual recount, and after hand-counted ballots in two counties had been included in the result, Bush's lead was reduced to under 200. At this point, the Bush camp appealed to the US Supreme Court, which had a majority of Republican judges; the court reversed the Florida Supreme Court's decision and cancelled the manual count, on the grounds that it would take too long – five weeks had passed and the presidency had still not been decided. The Supreme Court decision meant that Bush had won Florida, and with it, the presidency. He was the first president since 1888 to win the election and yet lose the nationwide popular vote. The court's action was controversial in the extreme; many people were convinced that if the manual recount had been allowed, Gore would have won.

(d) George W. Bush's first term (2001–5)

During his first year in office, the nature of President Bush's administration quickly became clear – he was on the far right, or neo-conservative, wing of the Republican party; one analyst later described him as 'the most hard-right president since Herbert Hoover'.

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Although he had campaigned as a 'compassionate conservative', he began by introducing massive tax cuts amounting to $1.35 trillion for the wealthiest citizens. He also signalled his intention to spend less on social services. He drew criticism from the European Union and other countries when he announced that the USA was withdrawing from the 1997 Kyoto Protocol, which aimed to reduce the emission of greenhouse gases (see Section 27.5(b)), and from the 1972 Anti-Ballistic Missile Treaty.

The president soon faced a testing crisis with the 11 September terrorist attacks on New York and Washington (see Section 12.3). He responded decisively, declaring war on terrorism and building up an international coalition to carry out the campaign. During the next 18 months the Taliban regime was removed from Afghanistan and Saddam Hussein was driven from power in Iraq. However, it proved more difficult to bring peace to these countries; two years after the overthrow of Saddam in April 2003, American soldiers in Iraq were still being killed by terrorists. There were reports that even in Afghanistan the Taliban were creeping back and gaining a hold in certain areas.

Meanwhile, at home the economy began to run into problems. The annual budget published in February 2004 showed that there was a deficit of well over 4 per cent of GDP (the EU ceiling was 3 per cent). Reasons for this were:

- increasing expenditure on anti-terrorist security measures and the continuing cost of the operations in Iraq;
- a fall in government revenue because of the huge tax cuts for the wealthy;
- extra credits given to farmers.

The government's policies were having mixed effects, the most striking one of which was the ever-widening gap between rich and poor. Statistics published at the end of 2003 showed that the richest one per cent of Americans owned well over 40 per cent of their nation's wealth. (For comparison, in the UK the richest 1 per cent owned 18 per cent of the total wealth.) This was not due solely to Bush's policies – it had been developing over the previous 20 years; but the trend accelerated after 2001, partly because of the tax cuts. The Centre for Public Integrity reported that every member of the Bush cabinet was a millionaire, and that its total net worth was more than ten times that of the Clinton cabinet.

At the other extreme there was increasing poverty, caused partly by rising unemployment and partly by low wages. Three million people had lost their jobs since Bush took office, and over 34 million, one in eight of the population, were living below the poverty line. Unemployment benefit was only paid for six months, and in some states – Ohio was an outstanding example – thousands of people were surviving with the help of charity food kitchens run by churches. At the end of Bush's first four years in office, the number of Americans living below the poverty line had increased by 4.3 million since he became president in January 2001.

Why was this happening in the world's richest country? The government blamed the closure of so many factories on foreign imports, and singled out China as the main culprit. The poor received only the minimum of help from the government because, basically, the Bush administration held fast to the traditional conservative American principles of *laissez-faire*: government should be kept to a minimum and should not have a direct role in alleviating poverty. Social welfare was thought to weaken self-reliance, whereas people should be encouraged to help themselves. Taxation was considered to be an unwarranted interference with individual property, and the wealthy should not feel obliged to help the poor, unless they chose to do so. The main obligation of business was to maximize profits for the benefit of shareholders; to that end, all government interference and regulation should be kept to a minimum.

Unfortunately this approach led to an 'anything goes' atmosphere, and some disturbing

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developments took place. In the absence of proper regulation, it was tempting for companies to 'manipulate' their accounts to show ever-increasing profits, and thereby keep their share prices rising. But this practice could not continue indefinitely; in November 2001 the energy trading company Enron went bankrupt after a series of secret deals – unknown both to the authorities and to investors – which turned out to be disastrously loss-making. Enron's chief executive and his board members had to face Congressional investigations for fraud. Several other major companies followed; tens of thousands of people lost their investments, while employees of the companies lost their retirement pensions when the pension funds disappeared.

As the election of November 2004 approached, many analysts believed that these mounting problems would bring about a Republican defeat. However, President Bush won a decisive, though still fairly close victory over his Democrat challenger, Senator John Kerry. Some 58.9 million Americans voted for Bush compared with 55.4 million for Kerry. The Republicans also increased their majority in the House of Representatives and the Senate. The growing poverty and unemployment in some states had apparently not been widespread enough to win the day for Kerry. *Other reasons suggested for the Republican victory include*:

- The Democrats failed to produce a clear campaign message setting out what the party stood for. Consequently, many voters decided it was wiser to stick with the tried and tested Bush rather than switch to Kerry, who was perceived as an unknown quantity.
- The Democrats failed to convince enough voters that they could be trusted to keep the country safe and secure.
- The Republicans were seen by the Christian right as the party that stood for moral and family values, whereas the Democrats were thought to be too sympathetic towards abortion and gay marriages.
- The Republicans were more successful than they had been in the 2000 election at galvanizing their supporters into going along to vote.

(e) George W. Bush's second term (2005–8)

Disaster struck in the first year of President Bush's second term, just as it had in the first. This time it was Hurricane Katrina which battered the southern coast on 29 August. New Orleans was right at the centre and suffered extensive damage and flooding. Louisiana, Mississippi and Alabama were badly affected and Bush declared a state of emergency in all three states. He toured the area, ordered federal cash to be used in the recovery and rebuilding process and sent the National Guard in to help the locals. The recovery was extremely slow and Bush was criticized for the government response and the apparent incompetence of those appointed to organize the recovery programme. Some observers believe that this flawed response to Hurricane Katrina was one of the reasons for the Republican defeats in the mid-term Congressional elections of 2006, which left Bush as a 'lame-duck' president – a president faced with a hostile Congress. In the area of health and social security, Bush's record was mixed. Increased funding introduced in 2003 for the National Institute of Health (NIF) was withdrawn because of rising inflation – the first time it had been reduced for 36 years. He approved an addition to the Medicare health-insurance scheme to provide assistance towards paying for prescription medicines. However, in 2007 he vetoed the State Children's Health Insurance Programme (SCHIP), which would have extended the amount of free healthcare for the children of poor families. It was to be funded by an increase in the tax on cigarettes, and had been approved by the House of Representatives and the Senate, both of which had a Democrat majority

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following the 2006 Congressional elections. Bush opposed the programme because he believed it was too close to socialism.

In the early part of Bush's second term the economic situation seemed to be improving. Unemployment fell but the underlying problem was still the huge budget deficit. At a time of reduced taxation, defence and military spending were increasing, thanks to the continued campaigns in Iraq and Afghanistan, where the Taliban insurgency was assuming crisis proportions (see Section 12.5). In December 2007 the country had slipped into a recession. Unemployment rose rapidly and in just one month – February 2008 – 63 000 jobs were lost. The president tried to help by launching an aid programme in which thousands of people received a large tax rebate and some struggling businesses were given tax breaks. This was not enough to turn the tide, and all parts of the economy were affected. House sales and prices fell dramatically, and there was a sub-prime mortgage crisis when people were unable to keep up repayments. This threw mortgage lenders into difficulties and *by September 2008 the US was on the brink of the worst financial crisis since the Great Depression of the 1930s.* On 15 September 2008 Lehman Brothers, the fourth largest investment bank in the USA, filed for bankruptcy (for full details of the world financial crisis see Section 27.7). In November 2008 over half a million jobs were lost. The National Bureau of Labor reported that by the time Bush left office no fewer than 2.9 million jobs had been lost since he came to power in January 2001.

As the November 2008 presidential election drew near, the Republicans could hardly have faced a more inauspicious situation. When Bush took office in 2001 the USA had a huge budget surplus of $2 trillion. That was not counting the national debt, which stood at $5.7 trillion. However, many economists predicted that if the government – of whichever party – continued on the same path followed by Bill Clinton, the national debt should be paid off in about ten years. Bush decidedly did not continue on the Clinton road. First of all he cut taxes – a very popular move; unfortunately that meant a reduction in government revenue of $1.8 trillion. Next he declared the 'war on terror', leading to the invasion of Iraq and the operations in Afghanistan. These were extremely expensive and were financed by borrowing to the tune of $1.5 trillion. The financial crisis and the recession reduced government income still further, so that by November 2008, according to political commentator Corey Robin, 'Bush had squandered the surplus and nearly doubled the size of the debt, adding more to it than any other president in US history.'

In the election on 4 November 2008 the Democrat presidential and vice-presidential candidates, Barack Obama and Joe Biden, won a comfortable victory over Republicans John McCain and Sarah Palin. The decisive factors were the unpopularity of the Iraq war, which McCain supported and Obama opposed, and the continuing economic crisis, which was blamed on Bush. Obama campaigned on a slogan of 'Washington must change', promising universal healthcare, full employment, green policies and a USA respected instead of feared by its enemies. He also labelled McCain's programme damagingly as 'more of the same', referring to his close association with the unpopular Bush over the previous eight years. This election made history: until 2008 both president and vice-president had always been WASPS; *now the president was an African American and the vice-president was a Roman Catholic.*

(f) Barack Obama (2009–13)

The most pressing problem facing the new president was the sorry state of the economy. Wasting no time, in February 2009 he signed into law the American Recovery and Reinvestment Act. This was a plan setting aside $787 billion to rescue the economy by creating new jobs. In June 2009 General Motors filed for bankruptcy, the largest manufacturing collapse in US history. Fortunately the government was able to step in and take

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over 60 per cent of the business. Then in July 2010 came the Financial Reform Act, designed to reduce the power of the large banks and provide more protection for customers and investors. This was a step in the right direction, but critics argued that it did not go far enough to be certain of preventing another financial crash like that of 2008. Obama was determined to deal with the other source of discontent – the war in Iraq. His first act as president was to ask his military leaders to prepare a plan for what he called a 'responsible' withdrawal of troops from Iraq, to be completed by the end of 2011. This was achieved: the war was formally declared to be over, although it was not the end of violence, since Sunnis and Shias continued to fight each other (see Section 12.4(f)).

Unfortunately the war in Afghanistan was decidedly not over; by the middle of 2009 the Taliban had been so successful that they controlled many areas and had set up shadow governments and law courts there. Many observers were convinced that it was impossible to defeat the Taliban militarily, and that talks would have to begin. Even President Karzai of Afghanistan thought this was the only way forward. However, Obama decided to have another 'surge', and in December 2009 he ordered an extra 30 000 troops into Afghanistan with orders to 'seize' the initiative'.

Another Obama initiative concerned the Arab–Israeli problem. In a speech in Cairo in June 2009 he had promised to form a new relationship of trust and co-operation between Islam and the USA, putting behind them years of suspicion and discord, and calming the dispute with Iran over nuclear weapons. The Iranian government made no response, but most other countries welcomed the announcement. He even apologized to Muslims for American military strength, the war in Iraq, Guantánamo and colonialism. It was probably because of this initiative that President Obama was awarded the Nobel Peace Prize in October 2009. It was a great honour for him, but it drew mixed reactions – critics said it was too early for such an award, as he had not actually achieved anything yet. Then in a speech at the UN General Assembly (23 September 2010), he proposed that a separate Palestinian state should be set up within a year and requested President Netanyahu of Israel to stop allowing new Israeli settlements to be built on land destined to be part of Palestine. Predictably, the Israelis were furious: they protested strongly and sought support from the Israeli lobby in the USA. Massive pressure was put on Obama by the conservatives until he felt obliged to change his position. The next demand for statehood by the Palestinians in September 2011 was vetoed at the United Nations – by the USA! Understandably they felt betrayed, and the new 'rapprochement' between the USA and Islam was looking distinctly shaky. Nor did it help that the Guantánamo Bay prison, which in January 2009 Obama had promised would be closed within the year, was still fully operational. . In domestic affairs Obama also ran into problems: there were great objections to his healthcare reforms designed to bring some 30 million more Americans within the protection of health insurance. Eventually he was able to sign the changes into law (March 2010), but the Republicans were so determined to strike down 'Obamacare' that 26 of the states challenged the legality of parts of the legislation via the Supreme Court. This took over two years to reach a decision – in June 2012 the Court ruled that the whole of the legislation was legal. It was due to be introduced piece by piece until it became fully operational in 2018, taking the USA closer than ever before to guaranteed coverage for everybody. In the mid-term elections of November 2010 the Democrats lost 63 seats and control of the House of Representatives, probably because the economy was showing very little sign of improvement and unemployment remained static. Leading the opposition to Obama was the Tea Party movement, a conservative group which advocated reduced taxes, lower government spending and paying off some of the national debt; in other words, a return to general austerity. They took their name from the Boston Tea Party of 1773, when colonists had protested against the British tax on tea by dumping tea taken from British ships into the harbour. After months of argument, in August 2011 Obama gave way and signed an austerity bill that, among other things, reduced the

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pay of federal workers, cut defence spending and endorsed a more aggressive austerity programme.

It was claimed that this had saved the USA from what would have been a disastrous debt default, though others argue that Obama would never have allowed the US to default; there was money in reserve to pay its debts, and there were alternative savings that he could have made, rather than default. Whatever the truth, the euphoria was only short-lived: only four days later the ratings agency, Standard and Poor's, cut the US triple-A rating for the first time, reducing it to AA+ status. The reason –the USA had failed to tackle its massive budget deficit and its equally massive debts. There were two bright spots among the gloom, though even they were controversial. In December 2010 President Obama signed an historic law repealing the ban on gays serving openly in the military – a largely popular move, but one which appalled the religious right. In May 2011 it was announced that Osama bin Laden, the al-Qaeda leader, had been killed by American troops in Pakistan (see Section 12.5). This caused widespread celebrations in the USA but brought relations with Pakistan to an all-time low. As the USA moved towards the next presidential election in November 2012, unemployment was still high and economic recovery very slow. Most commentators predicted a close election, but in the event, Obama won a comfortable victory over his Republican challenger, Mitt Romney. One important reason for this was the changing racial makeup of the USA – African Americans and Hispanics make up a steadily increasing proportion of the population, and overwhelmingly, they support the Democrats. The Republicans' anti-gay and anti-abortion policies lost them votes, and so too did the perception that Romney, a multi-millionaire, cared more for the interests of wealthy plutocrats than for the needs of ordinary people. Controversially, many Christian-right voters turned against Romney on the grounds that, since he was a Mormon, he could not be a true Christian. In the end Obama won much support for his demand that the wealthy (those earning more than $250 000 a year) should pay more in taxes.

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QUESTIONS

1 How far would you agree with the view that Johnson's administration was largely a failure because of US involvement in the Vietnam War?
2 Explain why there was such a powerful anti-communist movement in the USA in the years following the Second World War. How important was Senator Joseph McCarthy's role in the movement?
3 (a) Explain why Malcolm X left the Nation of Islam.
(b) 'The growth of radicalism among African Americans was important in helping them to gain their civil rights during the 1960s.' Explain whether you agree or disagree with this view.
4 Explain why the March on Washington took place in 1963.
5 'The use of non-violence was the most important reason for African Americans gaining improved civil rights in the years 1960–8.' How far would you agree with this statement?
6 Critics have sometimes described the presidencies of Jimmy Carter (1977–81) and George Bush (1989–93) as completely ineffective. Explain whether you think this is a fair criticism.
7 In what ways can the Clinton administration (1993–2001) be judged a success? Explain why, in spite of his successes, Clinton was impeached towards the end of his presidency.
8 Explain what was meant by 'Reaganomics', the term used to describe President Reagan's economic policies. How successful were these policies?
9 The presidency of George W. Bush has been described as 'one long disaster'. How far do you think this verdict is justified?

There is a document question about the struggle for civil rights on the website.

Part

V

Decolonization and After

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Chapter

24 The end of the European empires

SUMMARY OF EVENTS

At the end of the Second World War in 1945, the nations of Europe still claimed ownership of vast areas of the rest of the world, particularly in Asia and Africa.

- *Britain's Empire was the largest in area*, consisting of India, Burma, Ceylon, Malaya, enormous tracts of Africa and many assorted islands and other territories, such as Cyprus, Hong Kong, the West Indies, the Falkland Islands and Gibraltar.
- *France had the second largest empire*, with territories in Africa, Indo-China and the West Indies. In addition, Britain and France still held land in the Middle East, taken from Turkey at the end of the First World War. Britain held Transjordan and Palestine and France held Syria. They were known as *'mandated' territories*, which meant that Britain and France were intended to 'look after' them and prepare them for independence.
- *Other important empires* were those of the Netherlands (Dutch East Indies), Belgium (Congo and Ruanda Urundi), Portugal (Angola, Mozambique and Guinea), Spain (Spanish Sahara, Ifni, Spanish Morocco and Spanish Guinea) and Italy (Libya, Somalia and Eritrea).

Over the next 30 years, remarkable changes took place. By 1975 most of these colonial territories had gained their independence. Sometimes, as in the Dutch and French colonies, they had to fight for it against determined European resistance. The problems involved were often complex; in India there were bitter religious differences to resolve. In some areas – Algeria, Kenya, Tanganyika, Uganda and Rhodesia – large numbers of whites had settled, and they were relentlessly hostile to independence, which would place them under black rule. Britain was prepared to grant independence when it was felt that individual territories were ready for it, and most of the new states retained a link with Britain by remaining in the British Commonwealth (a group of former British-controlled nations which agreed to continue associating together, mainly because there were certain advantages to be gained from doing so).

The main British territories which gained independence, sometimes changing their names (new names in brackets), were:

India; Pakistan – 1947
Burma; Ceylon (Sri Lanka) – 1948
Transjordan (Jordan) – 1946; Palestine – 1948 (see Sections 11.1–2)
Sudan – 1956
Malaysia; Gold Coast (Ghana) – 1957

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Nigeria; Somaliland (became part of Somalia); Cyprus – 1960
Tanganyika and Zanzibar (together forming Tanzania) – 1961
Jamaica; Trinidad and Tobago; Uganda – 1962
Kenya – 1963
Nyasaland (Malawi); Northern Rhodesia (Zambia); Malta – 1964
British Guiana (Guyana); Barbados; Bechuanaland (Botswana) – 1966
Aden (South Yemen) – 1967
Southern Rhodesia (Zimbabwe) – 1980

The other colonial powers were at first determined to hold on to their empires by military force. But they all gave way in the end.

The main territories gaining independence were:

French
Syria – 1946
Indo-China – 1954
Morocco; Tunisia – 1956
Guinea – 1958
Senegal; Ivory Coast; Mauretania; Niger; Upper Volta (later Burkina-Faso); Chad; Madagascar (Malagasey); Gabon; French Sudan (Mali); Cameroun (Cameroon); Congo; Oubangui-Shari (Central Africa); Togo; Dahomey (Benin from 1975) – 1960

Dutch
East Indies (Indonesia) – 1949
Surinam – 1975

Belgian
Congo (Zaire 1971–97) – 1960
Ruanda-Urundi (became two separate states: Ruanda and Burundi) – 1962

Spanish
Spanish Morocco – 1956
Guinea (Equatorial Guinea) – 1968
Ifni (became part of Morocco) – 1969
Spanish Sahara (divided between Morocco and Mauretania) – 1975

Portuguese
Guinea (Guinea-Bissau) – 1974
Angola; Mozambique – 1975
East Timor (seized by Indonesia later in 1975) – 1975

Italian
Ethiopia – 1947
Libya – 1951
Eritrea (became part of Ethiopia) – 1952
Italian Somaliland (became part of Somalia) – 1960

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24.1 WHY DID THE EUROPEAN POWERS GIVE UP THEIR EMPIRES?

During the 1990s more documents dealing with decolonization became available, enabling historians to investigate more deeply the motives of the European powers in giving up their colonies and the different ways in which they carried out their withdrawals. The main debate that has developed is about the extent to which decolonization was caused by local nationalist movements, and how far it was brought about by outside political and economic considerations. Robert Holland, a leading exponent of what has become known as the '*metropolitan thesis*', believes that outside forces – metropolitan forces – were more important. He writes:

> The great colonial powers divested themselves of their subordinate possessions, not because internal pressures within their colonies left them with no other choice, but in the wake of a revisionist process whereby imperial roles came to be seen as incongruent with more 'modern' goals in the fields of foreign and economic policy.

Other historians feel that more credit must be given to the strength of local nationalist movements, and they acknowledge that in some cases the imperial power was quite simply expelled by sheer force. For example, would the British have left East and Central Africa for purely 'metropolitan' reasons if there had been no nationalist movements in these areas? Of course there is no simple answer. What can be said with certainty is that all these factors were present in varying degrees in all colonial territories.

(a) Nationalist movements

These had been in existence in many of Europe's overseas colonies, especially those in Asia, for many years before the Second World War. *Nationalists* were people who had a natural desire to get rid of their foreign rulers so that they could have a government run by people of their own nationality. Although the European powers claimed to have brought the benefits of western civilization to their colonies, there was a general feeling among colonial peoples that they were being exploited by the Europeans, who took most of the profits from their partnership. They claimed that the development and prosperity of the colonies were being held back in the interests of Europe, and that most of the colonial peoples continued to live in poverty. In India, *the Indian National Congress Party* had been agitating against British rule since 1885, while in south-east Asia, Vietnamese nationalists began to campaign against French rule during the 1920s. However, nationalism was not so strong in other areas, and progress towards independence would have been much slower without the boost provided by the Second World War. There is no doubt, however, that after the war the strength of nationalist feeling in many cases forced the colonial power to grant independence long before they had intended to do so. This often had disastrous results because the new states had not been properly prepared for independence. This was true of the British in Nigeria, the Belgians in the Congo and Rwanda-Urundi, the Spanish in Spanish Sahara and the Portuguese in Mozambique and Angola.

(b) Effects of the Second World War

The Second World War gave a great stimulus to nationalist movements in a number of ways:

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- *Before the war, colonial peoples believed it would be impossible to defeat the militarily superior Europeans by force of arms.* Japanese successes in the early part of the war showed that it was possible for non-Europeans to defeat European armies. Japanese forces captured the British territories of Malaya, Singapore, Hong Kong and Burma, the Dutch East Indies and French Indo-China. Although the Japanese were eventually defeated, the nationalists, many of whom had fought against the Japanese, had no intention of tamely accepting European rule again. After all, Britain, France and Holland had failed miserably to protect their subjects, thus destroying any claim to legitimacy they might have had. If necessary, nationalists would continue to fight against the Europeans, using the guerrilla tactics they had learned fighting the Japanese. This is exactly what happened in Indo-China (see Chapter 21), the Dutch East Indies, Malaya and Burma.
- *Asians and Africans became more aware of social and political matters as a result of their involvement in the war.* Some 374 000 Africans were recruited into the British armed forces. The vast majority of them had never left their homeland before, and they were appalled at the contrast between the primitive living conditions in Africa and the relatively comfortable conditions they experienced even as members of the armed forces. Some Asian nationalist leaders worked with the Japanese, thinking that after the war there would be more chance of independence being granted by the Japanese than by the Europeans. Many of them, like Dr Sukarno in the Dutch East Indies, gained experience helping to govern the occupied areas. Sukarno later became the first president of Indonesia (1949).
- Some European policies during the war encouraged colonial peoples to expect independence as soon as the war was over. The Dutch government, shocked that people were so ready to co-operate with the Japanese in the East Indies, offered them some degree of independence as soon as the Japanese were defeated. *The 1941 Atlantic Charter* set out joint Anglo-American thinking about how the world should be organized after the war. *Two of the points mentioned were:*

  - Nations should not expand by taking territory from other nations.
  - All peoples should have the right to choose their own form of government.

  Though Churchill later said that this only applied to victims of Hitler's aggression, the hopes of Asian and African peoples had been raised.
- *The war weakened the European states*, so that in the end, they were not militarily or economically strong enough to hold on to their far-flung empires in the face of really determined campaigns for independence. The British were the first to recognize this because, as Bernard Porter pointed out:

  > The British Empire had always been a cheapskate affair. Governments had never wanted to spend money on it or commit more than the minimum of personnel to it, or trouble the British people with it too much. The best way to manage things was to devolve the ruling of colonial possessions (and the expense) to settlers, or local traditional rulers (chiefs). This had its advantages but it also diluted Britain's power.

  Consequently the British responded by giving independence to India (1947). After that, British policy was to delay independence as long as possible, but to give way when the pressure became irresistible. At the same time the British concentrated on making their withdrawals 'look good'. It was important to give the impression that they were in control of the process, that it was something that they had intended all along, and that they were not 'scuttling away'. It was a further ten years

before the Gold Coast became the first British territory in Africa to win independence; this became a great source of inspiration for other African colonies. As Iain Macleod (British Colonial Secretary) later put it: 'we could not possibly have held by force our territories in Africa; the march of men towards freedom cannot be halted; it can only be guided'. The French, Dutch, Spanish and Portuguese reacted differently and seemed determined to preserve their empires. But this involved them in costly military campaigns, and eventually they all had to admit defeat.

(c) Pan-Africanism

Early in the twentieth century there was an important development in African thinking which emphasized that all people of African descent, wherever they lived, were united by the same cultural and spiritual heritage. Pan-Africanism, as it became known, was first publicized by people of African origin living outside Africa. At the forefront were Marcus Garvey, a self-educated Jamaican who had founded the Universal Negro Improvement Association, and W. E. B. Du Bois, the first African American to earn a doctorate from Harvard. Gradually these ideas spread and by the end of the Second World War some African students, mainly from British colonies, had taken up pan-Africanism. Not only was it an encouragement to their ambitions of independence, it also inspired them to think beyond that. If all Africans shared the same social and cultural ties, it meant that the ultimate goal after independence must be to abandon the artificial frontiers set up by the Europeans and have a sort of federal United States of Africa along the same lines as the United States of America.

Kwame Nkrumah, who was to become the first prime minister of a semi-independent Gold Coast and then the first president of Ghana, was a strong believer in pan-Africanism. He wasted no time before organizing meetings and conferences of African leaders in which he pressed the advantages of African unification. Some states supported the idea, including Guinea, Mali and Morocco, but a majority were not impressed – having just won their independence, they saw little point in surrendering a large proportion of it by entering a huge political federation. Some of the other leaders suspected that Nkrumah was developing delusions of grandeur, seeing himself as the president of a federal Africa. Strongest in their opposition were Ethiopia and Liberia, which had been independent for generations, together with Nigeria, Sierra Leone and almost all the former French colonies. By 1963 the prospect of a United States of Africa had disappeared when a conference of African countries at Addis Ababa (Ethiopia) decided that the best way forward would be for them all to join an Organization of African Unity (OAU), a much less binding arrangement, while still displaying a sort of unity. But pan-Africanism had not been totally irrelevant – it had been an important influence on the rise of nationalist movements in many of the former colonies.

(d) Outside pressures

There were several outside pressures on the colonial powers to give up their empires. The USA, no doubt remembering that they had been the earliest part of the British Empire to declare independence (1776), was hostile to imperialism (building up empires and owning colonies). During the war, President Roosevelt made it clear that he took the Atlantic Charter to apply to all peoples, not just those taken over by the Germans. He and his successor, Truman, pressurized the British government to speed up independence for India. Peter Clarke points out that Churchill's imperialism irritated the Americans to such an extent that they were determined not to do anything that would help Britain to keep its

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empire. One reason given by the Americans for wanting to see the end of the European empires was that delays in granting independence to European colonies in Asia and Africa would encourage the development of communism in those areas. While there was clearly some truth in this argument in the case of Asia, Bernard Porter was convinced that in the case of Africa, there was still comparatively little communist influence. More important was the fact that the Americans looked on the newly-independent nations as potential markets into which they could force their way and establish both economic and political influence. In the eyes of the USA, imperially protected markets gave the British and other Europeans an unfair advantage.

The United Nations Organization, under American influence, came out firmly against imperialism and demanded a step-by-step programme for decolonization. The USSR also added its voice to the chorus and constantly denounced imperialism. As well as putting the European states under pressure, this encouraged nationalists all over the world to intensify their campaigns.

Almost every case was different; the following sections will look at some of the different ways in which colonies and territories gained their independence.

24.2 INDIAN INDEPENDENCE AND PARTITION

(a) Background to independence

The British had made some concessions to the Indian nationalists even before the Second World War. The Morley–Minto reforms (1909), the Montague–Chelmsford reforms (1919) and the Government of India Act (1935) all gave the Indians more say in the government of their country. The Indians were also promised 'dominion status' as soon as the war was over. This meant becoming more or less completely independent, though still acknowledging the British monarch as head of state, like Australia. The Labour government, newly elected in 1945, wanted to show that it disapproved of exploiting the Indians and was anxious to press ahead with independence, on both moral and economic grounds. Ernest Bevin, the foreign secretary, had earlier toyed with the idea of delaying independence for a few years to enable Britain to finance a development programme for India. This idea was dropped because the Indians would be suspicious of any delay, and because Britain could not afford the expense, given its own economic difficulties. Bevin and Clement Attlee, the prime minister, therefore decided to give India full independence, allowing the Indians to work out the details for themselves.

The reasons why the British decided to grant Indian independence have been the subject of lively debate. Official sources presented it as the culmination of a process going back to the Government of India Act of 1919 – a process by which the British carefully prepared India for independence. Some Indian historians, including Sumit Sarkar and Anita Inder Singh, have challenged this view, arguing that Indian independence was never a long-term goal of the British and that the Government of India Acts of 1919 and 1935 were designed not to prepare the way for independence but to postpone it. Independence was not a gift from the British, it was 'the hard-won fruit of struggle and sacrifice'. Other historians have suggested that India was no longer of any value to Britain: instead of being a source of profit, it was now a drain on British resources. The aim of the government was therefore to get out of India in a way that did not look too much like a humiliation, and that kept India within the British financial network and Commonwealth.

Some writers have taken a middle view. Howard Brasted defended the Labour government against accusations that it made its policy up as it went along, and ended up running away from the problem. He showed that the Labour Party had drawn up a clear policy of withdrawal from India *before* the Second World War, and this was discussed by the party

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leader, Clement Attlee, and Jawaharlal Nehru, the Indian Congress leader, in 1938. Nehru and Gandhi knew that when Labour won the election of July 1945, Indian independence could not be far away. Sadly the progress towards independence turned out to be far more difficult than had been expected: the problems were so complex that the country ended up having to be divided into two states – India and Pakistan.

(b) Why was the partition of India necessary?

1 Religious hostility between Hindus and Muslims

This was the main problem. Hindus made up about two-thirds of the 400 million population, and the rest were mostly Muslims. After their victories in the 1937 elections when they won eight out of the eleven states, *the Hindu National Congress Party* unwisely called on *the Muslim League* to merge with Congress. This alarmed the Muslim League, who were afraid that an independent India would be dominated by Hindus. The Muslim leader, *M. A. Jinnah*, demanded *a separate Muslim state of Pakistan*, and adopted as his slogan 'Pakistan or Perish'.

2 Compromise attempts failed

Attempts to draw up a compromise solution acceptable to both Hindus and Muslims failed. The British proposed a federal scheme in which the central government would have only limited powers, while those of the provincial governments would be much greater. This would enable provinces with a Muslim majority to control their own affairs and there would be no need for a separate state. Both sides accepted the idea in principle but failed to agree on the details.

3 Violence broke out in August 1946

This began when the viceroy (the king's representative in India), Lord Wavell, invited the Congress leader, *Jawaharlal Nehru*, to form an interim government, still hoping that details could be worked out later. Nehru formed a cabinet which included two Muslims, but Jinnah was convinced that the Hindus could not be trusted to treat the Muslims fairly. He called for a day of 'direct action' in support of a separate Pakistan. Fierce rioting followed in Calcutta, where 5000 people were killed, and it soon spread to Bengal, where Muslims set about slaughtering Hindus. As Hindus retaliated, *the country seemed on the verge of civil war.*

4 Mountbatten decides on partition

The British government, realizing that they lacked the military strength to control the situation, announced early in 1947 *that they would leave India no later than June 1948*. The idea was to try to shock the Indians into adopting a more responsible attitude. *Lord Louis Mountbatten* was sent as the new viceroy, and he soon decided that partition was the only way to avoid civil war. He realized that there would probably be bloodshed whatever solution was tried, but felt that partition would produce less violence than if Britain tried to insist on the Muslims remaining part of India. Within six weeks Mountbatten had worked out a plan for dividing the country up and for the British withdrawal. This was accepted by Nehru and Jinnah, although *M. K. Gandhi*, known as the Mahatma (Great Soul), the other highly respected Congress leader, who believed in non-violence, was still hoping for a united India. Afraid that delay would cause more violence, Mountbatten brought the date for British withdrawal forward to August 1947.

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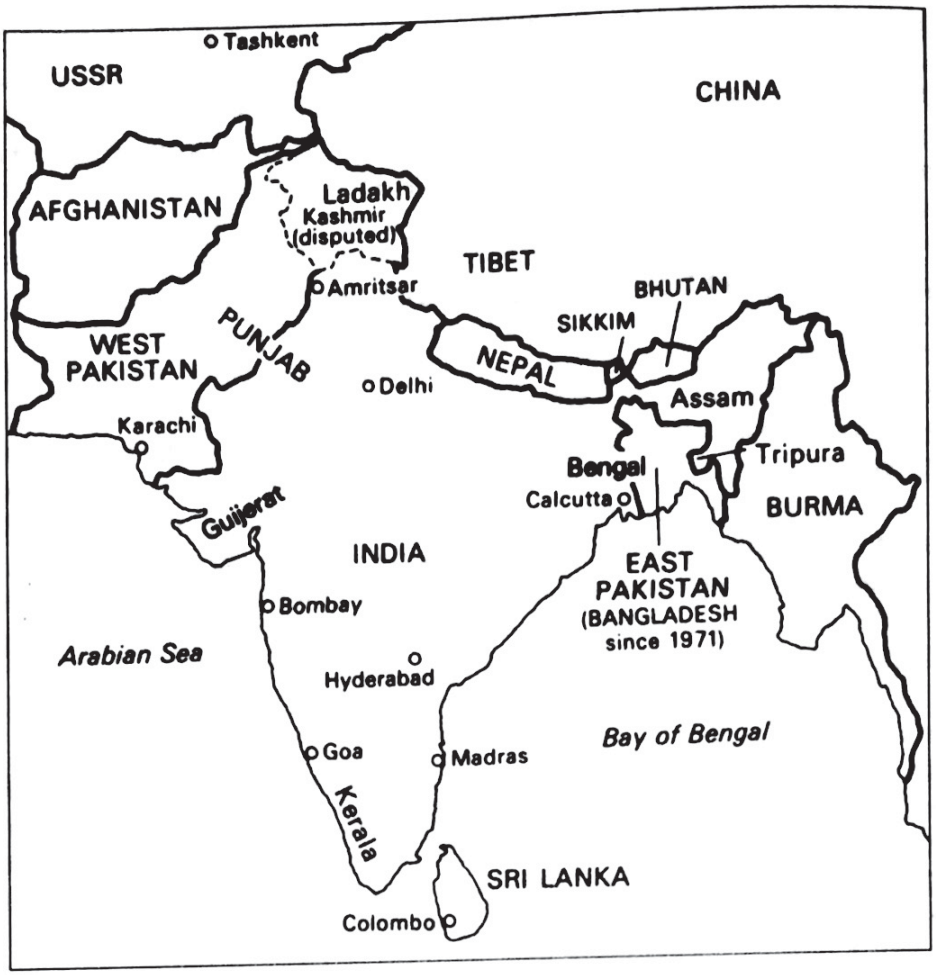

Map 24.1 **India and Pakistan**

(c) How was partition carried out?

The Indian Independence Act was rushed through the British parliament (August 1947), separating the Muslim majority areas in the north-west and north-east from the rest of India to become the independent state of Pakistan. The new Pakistan unfortunately consisted of two separate areas over a thousand miles apart (see Map 24.1). Independence day for both India and Pakistan was 15 August 1947. Problems followed immediately:

1 *It had been necessary to split the provinces of the Punjab and Bengal, which had mixed Hindu/Muslim populations.* This meant that millions of people found themselves on the wrong side of the new frontiers – Muslims in India and Hindus in Pakistan.
2 *Afraid of being attacked, millions of people headed for the frontiers*, Muslims trying to get into Pakistan and Hindus into India. Clashes occurred which developed into near-hysterical mob violence, especially in the Punjab, where about 250 000 people were murdered. Violence was not quite so widespread in Bengal, where Gandhi, still preaching non-violence and toleration, managed to calm the situation.
3 *Violence began to die down before the end of 1947, but in January 1948 Gandhi was shot dead by a Hindu fanatic* who detested his tolerance towards Muslims. It was a tragic end to a disastrous set of circumstances, but the shock somehow seemed to bring people to their senses, so that the new governments of India and Pakistan could begin to think about their other problems. From the British point of view, the government could claim that although so many deaths were regrettable,

the granting of independence to India and Pakistan was an act of far-sighted statesmanship. Attlee argued, with some justification, that Britain could not be blamed for the violence; this was due, he said, 'to the failure of the Indians to agree among themselves'. V. P. Menon, a distinguished Indian political observer, believed that Britain's decision to leave India 'not only touched the hearts and stirred the emotions of India … it earned for Britain universal respect and goodwill'. Howard Brasted agreed, pointing out that a less sensitive handling of the situation by the British government could have produced an even more catastrophic bloodbath. On the other hand, A. N. Wilson believes that there could have been less violence if Mountbatten had acted differently. He should have provided peacekeeping forces to protect the migrant populations, and he should have taken more care in deciding the frontiers. Wilson writes, perhaps a trifle unfairly: 'By his superficial haste, his sheer arrogance and his inattention to vital detail … Mountbatten was responsible for as many deaths as some of those who were hanged after the Nuremberg trials.'

4 *In the longer term, Pakistan did not work well as a divided state*, and in 1971 East Pakistan broke away and became the independent state of Bangladesh.

24.3 THE WEST INDIES, MALAYA AND CYPRUS

As these three territories moved towards independence, interesting experiments in setting up federations of states were tried, with varying degrees of success. A federation is where a number of states join together under a central or federal government which has overall authority; each of the states has its own separate parliament, which deals with internal affairs. This is the type of system which works well in the USA, Canada and Australia, and many people thought it would be suitable for the British West Indies and for Malaya and neighbouring British territories.

- *The West Indies Federation was the first one to be tried*, but it proved to be a failure: set up in 1958, it only survived until 1962.
- *The Federation of Malaysia*, set up in 1963, was much more successful.
- *The British handling of independence for Cyprus unfortunately was not a success* and the island had a troubled history after the Second World War.

(a) The West Indies

Britain's West Indian possessions consisted of a large assortment of islands in the Caribbean Sea (see Map 24.2); the largest were Jamaica and Trinidad, and others included Grenada, St Vincent, Barbados, St Lucia, Antigua, the Seychelles and the Bahamas. There were also British Honduras on the mainland of Central America and British Guiana on the north-east coast of South America. Together these territories had a population of around six million. Britain was prepared in principle to give them all independence, but there were problems.

- *Some of the islands were very small, and there were doubts about whether they were viable as independent states.* Grenada, St Vincent and Antigua, for example, had populations of only about 100 000 each, while some were even smaller: the twin islands of St Kitts and Nevis had only about 60 000 between them.
- *The British Labour government felt that a federation could be the ideal way of uniting such small and widely scattered territories, but many of the territories themselves objected.* Some, like Honduras and Guiana, wanted nothing to do with a

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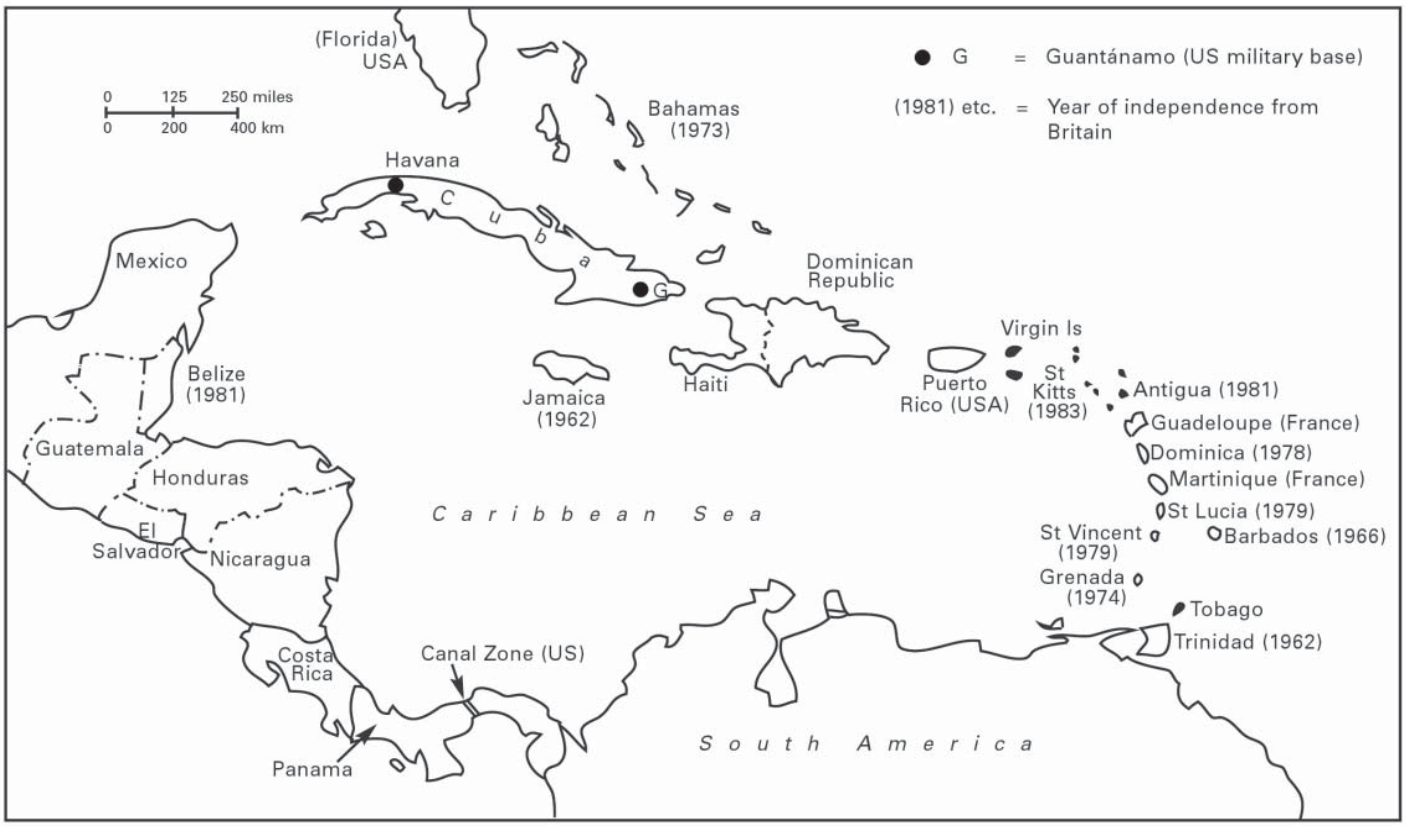

Map 24.2 **Central America and the West Indies**

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federation, preferring completely separate independence. This left Jamaica and Trinidad worried about whether they would be able to cope with the problems of the smaller islands. Some islands did not like the prospect of being dominated by Jamaica and Trinidad, and some of the smallest were not even sure they wanted independence at all, preferring to remain under British guidance and protection.

Britain went ahead in spite of the difficulties and established the West Indies Federation in 1958 (excluding British Honduras and British Guiana). But it never really functioned successfully. The one thing they all had in common – a passionate commitment to cricket – was not enough to hold them together, and there were constant squabbles about how much each island should pay into the federal budget and how many representatives they should each have in the federal parliament. When Jamaica and Trinidad withdrew in 1961, the federation no longer seemed viable. In 1962 Britain decided to abandon it and grant independence separately to all those that wanted it. By 1983 all parts of the British West Indies, except a few tiny islands, had become independent. Jamaica and Trinidad and Tobago were first, in 1962, and the islands of St Kitts and Nevis were last, in 1983. British Guiana became known as Guyana (1966) and British Honduras took the name Belize (1981). All of them became members of the British Commonwealth.

Ironically, having rejected the idea of a fully-fledged federation, they soon found that there were economic benefits to be had from co-operation. The Caribbean Free Trade Association was set up in 1968, and this soon developed into *the Caribbean Community and Common Market (CARICOM) in 1973*, which all the former British West Indies territories (including Guyana and Belize) joined.

(b) Malaya

Malaya was liberated from Japanese occupation in 1945, but there were two difficult problems to be faced before the British were prepared to withdraw.

1 *It was a complex area which would be difficult to organize.* It consisted of nine states each ruled by a sultan, two British settlements, Malacca and Penang, and Singapore, a small island less than a mile from the mainland. The population was multiracial: mostly Malays and Chinese, but with some Indians and Europeans as well. In preparation for independence it was decided to group the states and the settlements *into the Federation of Malaya (1948)*, while Singapore remained a separate colony. Each state had its own legislature for local affairs; the sultans retained some power, but the central government had firm overall control. All adults had the vote and this meant that the Malays, the largest group, usually dominated affairs.
2 *Chinese communist guerrillas led by Chin Peng, who had played a leading role in the resistance to the Japanese, now began to stir up strikes and violence against the British*, in support of an independent communist state. The British decided to declare a state of emergency in 1948, and in the end they dealt with the communists successfully, though it took time, and the state of emergency remained in force until 1960. Their tactics were to resettle into specially guarded villages all Chinese suspected of helping the guerrillas. It was made clear that independence would follow as soon as the country was ready for it; this ensured that the Malays remained firmly pro-British and gave very little help to the communists, who were Chinese.

The move towards independence was accelerated when the Malay Party, under their able leader *Tunku Abdul Rahman*, joined forces with the main Chinese and Indian groups to

Map 24.3 **Malaysia and Indonesia**

form *the Alliance Party*, which won 51 out of the 52 seats in the 1955 elections. This seemed to suggest stability and the British were persuaded to grant full independence in 1957, when Malaya was admitted to the Commonwealth.

The Federation of Malaysia was set up in 1963. Malaya was running well under Tunku's leadership, and its economy, based on exports of rubber and tin, was the most prosperous in south-east Asia. In 1961, when the Tunku proposed that Singapore and three other British colonies, North Borneo (Sabah), Brunei and Sarawak, should join Malaya to form the Federation of Malaysia, Britain agreed (see Map 24.3). After a United Nations investigation team reported that a large majority of the populations concerned was in favour of the union, the Federation of Malaysia was officially proclaimed (September 1963). Brunei decided not to join, and eventually became an independent state within the Commonwealth (1984). Although Singapore decided to leave the Federation to become an independent republic in 1965, the rest of the Federation continued successfully.

(c) Cyprus

The British Labour government (1945–51) considered giving Cyprus independence, but progress was delayed by complications, the most serious of which was the mixed population – about 80 per cent were Greek-speaking Christians of the Orthodox Church, while the rest were Muslims of Turkish origin. The Greek Cypriots wanted the island to unite with Greece (*enosis*), but the Turks were strongly opposed to this. Churchill's government (1951–5) inflamed the situation in 1954 when their plans for self-government allowed the Cypriots far less power than Labour had had in mind. There were hostile demonstrations, which were dispersed by British troops.

Sir Anthony Eden, Churchill's successor, decided to drop the idea of independence for Cyprus, believing that Britain needed the island as a military base to protect her interests in the Middle East. He announced that Cyprus must remain permanently British, though the Greek government promised that Britain could retain her military bases even if *enosis* took place.

The Greek Cypriots, led by *Archbishop Makarios*, pressed their demands, while a

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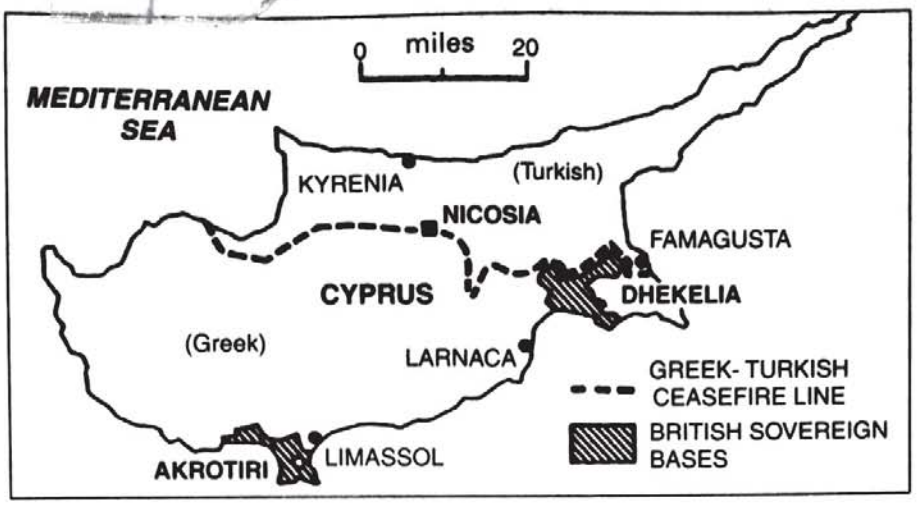

Map 24.4 **Cyprus divided**

guerrilla organization called *Eoka*, led by General Grivas, waged a terrorist campaign against the British, who declared a state of emergency (1955) and deployed about 35 000 troops to try to keep order. British policy also involved deporting Makarios and executing terrorists. The situation became even more difficult in 1958 when the Turks set up a rival organization in support of dividing the island.

Eventually, to avoid possible civil war between the two groups, Harold Macmillan, Eden's successor, decided to compromise. He appointed the sympathetic and tactful Hugh Foot as governor and he negotiated a deal with Makarios:

- The Archbishop dropped *enosis* and in return Cyprus was granted full independence.
- Turkish interests were safeguarded, Britain retained two military bases and, along with Greece and Turkey, guaranteed the independence of Cyprus.
- Makarios became the first president with a Turkish Cypriot, Fazil Kutchuk, as vice-president (1960). It seemed the perfect solution.

Unfortunately it only lasted until 1963 when civil war broke out between Greeks and Turks. In 1974 Turkey sent troops to help establish a separate Turkish state in the north, and the island has remained divided since then (Map 24.4). Turks occupy the north (roughly one-third of the island's area) and Greeks the south, with UN troops keeping the peace between the two. Many attempts were made to find agreement, but all failed. In the mid-1980s the UN began to press the idea of a federation as the most likely way of reconciling the two states, but this solution was rejected by the Greeks (1987). In April 2003 the checkpoints along the frontier between the two states were opened so that both Greek and Turkish Cypriots could cross the partition line for the first time since 1974. The island was still divided in May 2004 when the Republic of Cyprus (Greek) joined the European Union. The Turkish Republic of Northern Cyprus also voted to join, but since it was only recognized as an independent state by Turkey, it was not part of the accession agreement.

24.4 THE BRITISH LEAVE AFRICA

African nationalism spread rapidly after 1945; this was because more and more Africans were being educated in Britain and the USA, where they were made aware of racial discrimination. Colonialism was seen as the humiliation and exploitation of blacks by whites, and working-class Africans in the new towns were particularly receptive to

nationalist ideas. The British, especially the Labour governments of 1945–51, were quite willing to allow independence, and were confident that they would still be able to exercise influence through trade links, which they hoped to preserve by including the new states as members of the Commonwealth. This practice of exercising influence over former colonies after independence by economic means became known as *neo-colonialism*; it became widespread in most of the new states of the Third World. Even so, the British intended to move the colonies towards independence very gradually, and the African nationalists had to campaign vigorously and often violently to make them act more quickly.

The British colonies in Africa fell into three distinct groups, which had important differences in character that were to affect progress towards independence.

WEST AFRICA: Gold Coast, Nigeria, Sierra Leone and the Gambia
Here there were relatively few Europeans, and they tended to be administrators rather than permanent settlers with profitable estates to defend. This made the move to independence comparatively straightforward.

EAST AFRICA: Kenya, Uganda and Tanganyika
Here, especially in Kenya, things were complicated by the 'settler factor' – the presence of European and Asian settlers, who feared for their future under black governments.

CENTRAL AFRICA: Nyasaland, Northern and Southern Rhodesia
Here, especially in Southern Rhodesia, the 'settler factor' was at its most serious. This was where European settlers were most firmly entrenched, owning huge and profitable estates, and confrontation between white settlers and African nationalists was most bitter.

(a) West Africa

1 The Gold Coast

The Gold Coast was the first black African state south of the Sahara to win independence after the Second World War, taking the name *Ghana (1957)*. It was achieved fairly smoothly, though not without some incident. The nationalist leader, Kwame Nkrumah, educated in London and the USA and since 1949 leader of *the Convention People's Party (CPP)*, organized the campaign for independence. There were boycotts of European goods, violent demonstrations and a general strike (1950), and Nkrumah and other leaders were imprisoned for a time. But the British, realizing that he had mass support, soon released him and agreed to allow a new constitution which included the vote for all adults; an elected Assembly; and an eleven-man Executive Council, of which eight were chosen by the Assembly.

In the 1951 elections, the first under the new constitution, the CPP won 34 seats out of 38. Nkrumah was released from prison, invited to form a government and became prime minister in 1952. This was self-government but not yet full independence. The Gold Coast had a small but well-educated group of politicians and other professionals, who, for the next five years, gained experience of government under British supervision. This experience was

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unique to Ghana; had it been repeated in other newly independent states, it might possibly have helped to avoid chaos and mismanagement. In 1957 Ghana, as it became known, received full independence.

2 Nigeria

Nigeria was easily the largest of Britain's African colonies, with a population of over 60 million. It was a more difficult proposition than Ghana because of its great size, and because of its regional differences between the vast Muslim north, dominated by the Hausa and Fulani tribes, the western region (Yorubas) and the eastern region (Ibos). The leading nationalist was *Nnamdi Azikiwe*, popularly known to his supporters as 'Zik'. He was educated in the USA and for a time worked as a newspaper editor in the Gold Coast. After his return to Nigeria in 1937 he founded a series of newspapers and became involved in the nationalist movement, soon gaining enormous prestige. In 1945 he showed he meant business by organizing an impressive general strike, which was enough to prompt the British to begin preparing Nigeria for independence. It was decided that a federal system would be most suitable; in 1954 a new constitution introduced local assemblies for the three regions, with a central (federal) government in Lagos, the capital. The regions assumed self-government first and the country as a whole became independent in 1960. Sadly, in spite of the careful preparations for independence, tribal differences caused civil war to break out in 1967 when the Ibos declared the eastern region independent with the name *Biafra* (see Section 25.3).

The other two British colonies in West Africa achieved independence without serious incident – Sierra Leone in 1961 and the Gambia in 1965 (see Map 24.5).

(b) East Africa

The British thought that independence for the colonies of East Africa was not so necessary as for West Africa, and that when independence did come, it would be in the form of multiracial governments, in which the European and Asian settlers would play a significant part. But during Harold Macmillan's government (1957–63) *an important change took place in British policy towards both East and Central Africa*. Macmillan had come to realize the strength of black African nationalist feeling; in a famous speech in Cape Town in 1960, he said: 'the wind of change is blowing through the continent. Whether we like it or not, this growth of national consciousness is a political fact, and our national policies must take account of it.'

1 Tanganyika

In Tanganyika the nationalist campaign was conducted by *the Tanganyika African National Union (TANU)* led by *Dr Julius Nyerere*, who had been educated at the University of Edinburgh. He insisted that the government must be African, but he also made it clear that whites had nothing to fear from black rule. Macmillan's government, impressed by Nyerere's ability and sincerity, conceded independence with black majority rule (1961). The island of Zanzibar was later united with Tanganyika, and the country took the name Tanzania (1964). Nyerere was president until his retirement in 1985.

2 Uganda

In Uganda independence was delayed for a time by tribal squabbles; the ruler (known as the kabaka) of the Buganda area objected to the introduction of democracy. Eventually a solution was found in a federal constitution which allowed the kabaka to retain some powers in Buganda. Uganda itself became independent in 1962 with *Dr Milton Obote* as prime minister.

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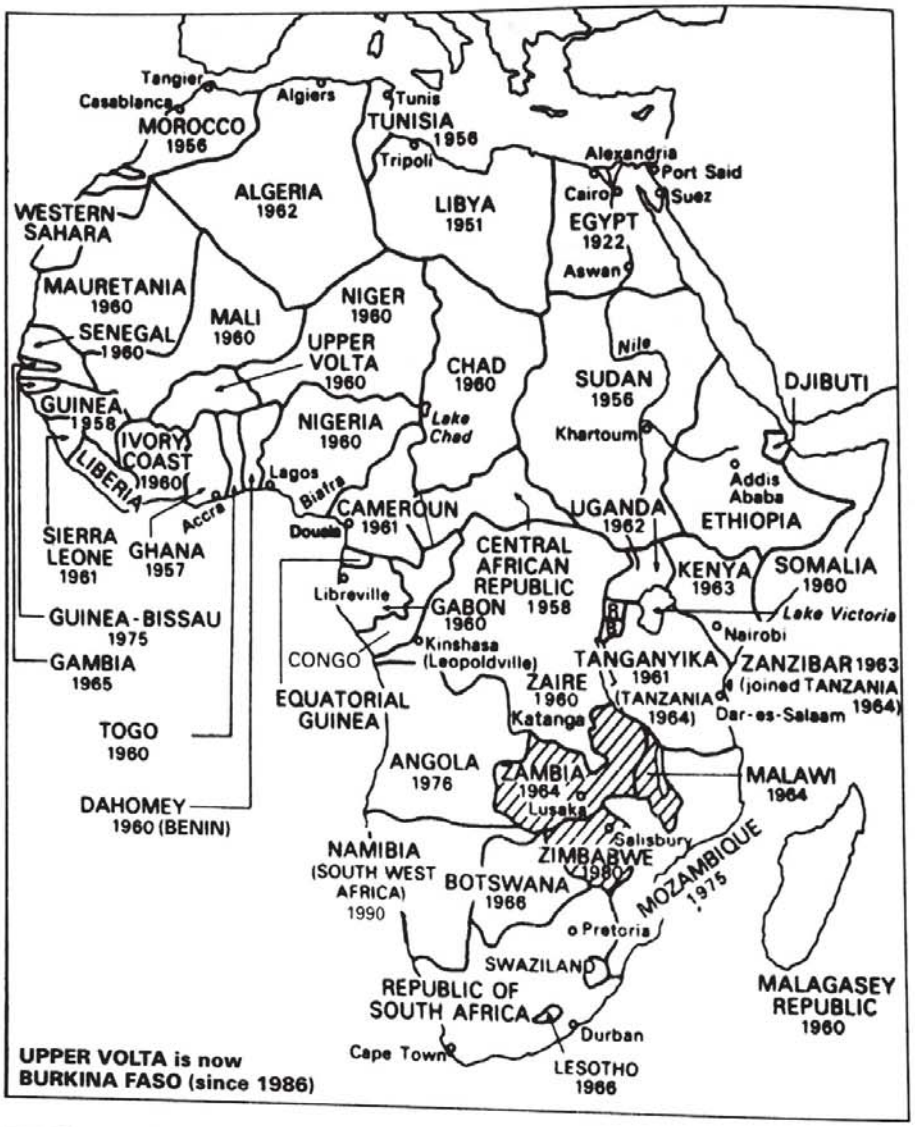

Map 24.5 **Africa becomes independent**

3 Kenya

Kenya was the most difficult area of East Africa to deal with because of the presence of a significant non-African population. As well as the 10 million Africans, there were some 66 000 white settlers who were violently opposed to black majority rule. There were also around 200 000 Indians and 35 000 Muslim Arabs. But it was the white settlers who had the political influence over the British government. They pointed out that they had worked hard and devoted their lives to making their farms successful, and that they now saw themselves as white Africans, and that Kenya was their homeland.

The main Kenyan African leader was *Jomo Kenyatta*; born in 1894, he was a member of the Kikuyu tribe and a veteran among African nationalists. He spent some time in Britain during the 1930s and returned to Kenya in 1947, becoming leader of the *Kenya African Unity Party (KAU)*, which consisted mostly of members of the dominant Kikuyu tribe. He hoped to win African majority rule gradually, first of all gaining more African

seats on the Legislative Council. However, the more radical wing of his party – calling themselves the Forty Group – wanted to drive the British out by force, if necessary. The main African grievance was the land situation: the most fertile farming land was on the highland plateau, but only white settlers were allowed to farm there. Africans also resented the discrimination and the colour bar between blacks and whites, under which they were treated as inferior, second-class citizens. This was especially unacceptable, since many Africans had served in the army during the Second World War and had received equal treatment and respect from whites. Moreover it was clear that the whites expected to keep all their privileges even if they had to agree to independence.

The white settlers refused to negotiate with Kenyatta, and were determined to prolong their rule. They provoked a confrontation, hoping that violence would destroy the African Party. The British government was under pressure from both sides, and the white settlers were supported by certain big-business interests in Britain; even so, it did not handle the situation with much imagination. The KAU was able to make little progress, the only British concession being to allow six Africans to join the Legislative Council of 54 members.

In 1952, African impatience burst out in an uprising against the British, with attacks on European-owned farms and on black workers. It was organized by the *Mau Mau* secret society, whose members were mainly from the Kikuyu tribe. A state of emergency was declared (1952); Kenyatta and other nationalist leaders were arrested and found guilty of terrorism. Kenyatta was kept in jail for six years although he had publicly condemned violence and insisted that the KAU had not been involved in organizing the rebellion. In 1954 the British launched Operation Anvil in which 100 000 troops were deployed to flush out the terrorists (the Africans regarded themselves as freedom fighters, not terrorists).

There was a scandal in 1959 with revelations of brutal treatment of prisoners at the Hola detention camp, where savage beatings left 11 dead. However, the British government managed to hide from people at home the scale of what was going on in Kenya. It was only in 2005 that the full horrifying details were revealed in two separate books by historians David Anderson and Caroline Elkins. During the period of the emergency the British hanged more than a thousand Kikuyu, and killed some 20 000 in combat. In addition up to 100 000 died in detention camps, where there was a culture of brutality, routine beatings, killings and torture of the most grotesque kinds. One police chief later admitted that conditions in the camps were far worse than he had suffered as a prisoner of war in Japan. By contrast, less than a hundred whites were killed.

The uprising had been defeated by 1960, but by then, ironically, the British, encouraged by the 'wind of change' and by the expense of the anti-terrorist campaign, had changed their attitude. Harold Macmillan, who became prime minister in January 1957, faced up to the fact that it was impossible and indefensible to continue trying to prolong the privileged position of a group which made up no more than 5 per cent of the population. He decided to move Kenya towards independence. Africans were allowed to settle in the fertile highland plateau; restrictions were lifted on what the Kikuyus could grow, and as a result, coffee became one of the main crops. Attempts were made to increase the political role of the Africans; in 1957 elections were held for eight African seats in the Legislative Council, and the following year plans were announced to increase African membership of the council. In 1960 Africans became the majority group on the council and were given four out of ten seats in the Council of Ministers. In 1961 Kenyatta was at last released.

Progress towards independence was held up by rivalry and disagreement between the different tribal groups. While Kenyatta had been in prison, new leaders had emerged. *Tom Mboya* and *Oginga Odinga*, both members of the second largest ethnic group, the Luo, formed *the Kenya African National Union (KANU)*, which largely succeeded in uniting the Kikuyus and Luos. When Kenyatta was freed, so great was his prestige that he was immediately recognized as leader of KANU; both Kikuyus and Luos co-operated

well together, and they wanted a strong, centralized government which would be dominated by their tribes. However, there were a number of smaller tribes who did not relish the idea of being controlled by Kikuyus and Luos. Led by Ronald Ngala, they formed a rival party – *the Kenya African Democratic Union (KADU)* – and they wanted a federal form of government which would enable them to have more control over their own affairs.

Both parties worked together to form a coalition government (1962), in preparation for elections to be held in May 1963. KANU won a clear majority in the elections and Kenyatta became prime minister of a self-governing Kenya. It was decided to abandon the idea of a federal system of government; Kenya became fully independent in December 1963. A year later it became a republic with Kenyatta as its first president and Odinga as vice-president. To his great credit, in spite of his harsh treatment by the British, Kenyatta favoured reconciliation; whites who decided to stay on after independence were fairly treated provided they took Kenyan citizenship, and Kenya became one of the most pro-British of the former colonies. Sadly, the tribal differences continued to cause problems after independence; the Luos believed that Kikuyus were receiving special treatment from the government and Kenyatta and Odinga fell out. Mboya was assassinated in 1969 and Odinga was sacked and spent two years in prison.

(c) Central Africa

This was the most troublesome area for Britain to deal with because this was where the settlers were most numerous and most deeply entrenched, particularly in Southern Rhodesia. Another problem was that numbers of well-educated Africans were much smaller than in West Africa because the settlers had ensured that very little money was spent on further and higher education for black Africans. Missionaries did their best to provide some education, but their efforts were often frustrated by the white governments. Alarmed at the spread of nationalism, the whites decided that their best policy was to combine resources. They persuaded Churchill's government (1953) to allow them to set up a union of the three colonies – Nyasaland and Northern and Southern Rhodesia, to be known as *the Central African Federation*. Their aim was to preserve the supremacy of the white minority (about 300 000 Europeans out of a total population of about 8.5 million). The federal parliament in Salisbury (the capital of Southern Rhodesia) was heavily weighted to favour the whites, who hoped that the federation would soon gain full independence from Britain, with dominion status.

The Africans watched with growing distrust, and their leaders, Dr Hastings Banda (Nyasaland), Kenneth Kaunda (Northern Rhodesia) and Joshua Nkomo (Southern Rhodesia) began to campaign for black majority rule. As violence developed, a state of emergency was declared in Nyasaland and Southern Rhodesia, with mass arrests of Africans (1959). However, there was much support for the Africans in Britain, especially in the Labour Party, and the Conservative colonial secretary, Iain Macleod, was sympathetic. *The Monckton Commission (1960) recommended* votes for Africans, an end to racial discrimination and the right of territories to leave the Federation.

1 Nyasaland and Northern Rhodesia

The British introduced new constitutions in Nyasaland and Northern Rhodesia which, in effect, allowed the Africans their own parliaments (1961–2). Both wanted to leave the Federation, which was therefore terminated in December 1963, signalling defeat for the settlers. *The following year Nyasaland and Northern Rhodesia became fully independent, taking the names Malawi and Zambia.*

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2 *Southern Rhodesia*

Southern Rhodesia took much longer to deal with, and it was 1980 before the colony achieved independence with black majority rule. It was in Rhodesia, as it was now known, that the white settlers fought most fiercely to preserve their privileged position. There were fewer than 200 000 whites, about 20 000 Asians and 4 million black Africans, but *the Rhodesia Front*, a right-wing white racist party, was determined never to surrender control of the country to black African rule. The black African parties were banned.

When Zambia and Malawi were given independence, the whites assumed that Southern Rhodesia would get the same treatment, and put in a formal request for independence. The British Conservative government refused and made it clear that independence would be granted *only if the constitution was changed to allow black Africans at least a third of the seats in parliament*. Ian Smith (who became prime minister of Southern Rhodesia in April 1964) rejected this idea and refused to make any concessions. He argued that continued white rule was essential in view of the problems being faced by the new black governments in other African states, and because the Zimbabwe nationalists seemed bitterly divided. Harold Wilson, the new British Labour prime minister (1964–70), continued to refuse independence unless the constitution was changed to prepare for black majority rule. Since no compromise seemed possible, Smith declared Southern Rhodesia independent, against the wishes of Britain (a unilateral declaration of independence, or UDI), in November 1965.

There were mixed reactions to UDI:

- *At first there seemed very little Britain could do about it*, once the government had decided not to use force against the illegal Smith regime. It was hoped to bring the country to its knees by economic sanctions, and Britain stopped buying sugar and tobacco from Rhodesia.
- *The UN condemned UDI* and called on all member states to place a complete trade embargo on Rhodesia.
- *South Africa, also ruled by a white minority government, and Portugal, which still controlled neighbouring Mozambique, were sympathetic to the Smith regime* and refused to obey the Security Council resolution. This meant that Rhodesia was able to continue trading through these countries. Many other countries, while publicly condemning UDI, privately evaded the embargo; the USA, for example, bought Rhodesian chrome because it was the cheapest available. Companies and businessmen in many countries, including British oil companies, continued to break sanctions, and although the Rhodesian economy suffered to some extent, it was not serious enough to topple the Smith regime.
- *The Commonwealth was seriously shaken.* Ghana and Nigeria wanted Britain to use force, and offered to supply troops. Zambia and Tanzania hoped that economic sanctions would suffice; relations with the British became extremely cool when it seemed that they were deliberately soft-pedalling sanctions, especially as Zambia was suffering more from them than Rhodesia. When Wilson twice met Smith (aboard HMS *Tiger* in 1966 and HMS *Fearless* in 1968) to put new proposals, there was a howl of protest in case he betrayed the black Rhodesians. Perhaps fortunately for the future of the Commonwealth, Smith rejected both sets of proposals.
- *The World Council of Churches* set up a programme to combat racism (1969), and this gave encouragement and support to the nationalists both morally and financially.

In 1970 Rhodesia declared itself a republic, and the rights of black citizens were gradually whittled away until they were suffering similar treatment to that experienced by blacks in South Africa (see Section 25.8). In 1976 the first signs began to appear that the whites would have to compromise. *Why did the whites give way?*

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1 *Mozambique's independence from Portugal (June 1975)* was a serious blow to Rhodesia. The new president of Mozambique, Samora Machel, applied economic sanctions and allowed Zimbabwean guerrillas to operate from Mozambique.
2 *The 'front-line states'* – which included Zambia, Botswana and Tanzania, as well as Mozambique – *supported the armed struggle* and provided training camps for the resistance movement. Thousands of black guerrillas were soon active in Rhodesia, straining the white security forces to their limits and forcing Smith to hire foreign mercenaries.
3 *The South Africans became less inclined to support Rhodesia* after their invasion of Angola (October 1975) had been called off on American orders. The Americans and South Africans were helping the rebel FNLA (National Front for the Liberation of Angola), which was trying to overthrow the ruling MPLA Party (People's Movement for Angolan Liberation), which had Russian and Cuban backing. The Americans were afraid that the USSR and Cuba might become involved in Rhodesia unless some compromise could be found; together with South Africa, they urged Smith to make concessions to the blacks before it was too late.
4 *By 1978 nationalist guerrillas controlled large areas of the Rhodesian countryside.* Farming was adversely affected as white farmers were attacked; schools in rural areas were closed and sometimes burnt down. It became clear that the defeat of the whites was only a matter of time.

Smith still tried everything he knew to delay black majority rule as long as possible. He was able to present the divisions between the nationalist leaders as his excuse for the lack of progress, and this was a genuine problem:

- **ZAPU** (the Zimbabwe African People's Union) was the party of the veteran nationalist Joshua Nkomo.
- **ZANU** (the Zimbabwe African National Union) was the party of the Reverend Ndabaningi Sithole.

These two, representing different tribes, seemed to be bitter enemies.

- **UANC** (the United African National Council) was the party of Bishop Abel Muzorewa.
- **Robert Mugabe**, leader of the guerrilla wing of ZANU, was another powerful figure, who eventually emerged as ZANU's unchallenged leader.

The divisions were reduced to some extent as a result of the 1976 Geneva Conference, when ZAPU and ZANU came together loosely in the Patriotic Front (PF). After this, the parties were referred to as **ZANU-PF** and **PF-ZAPU**.

Smith now tried to compromise by introducing his own scheme, a joint government of whites and UANC, the most moderate of the nationalist parties, with Bishop Muzorewa as prime minister. The country was to be called Zimbabwe/Rhodesia (April 1979). However, it was ZANU-PF and PF-ZAPU which had mass support and they continued the guerrilla war. Smith soon had to admit defeat and the British called *the Lancaster House Conference* in London (September–December 1979), which agreed the following points.

- There should be a new constitution which would allow the black majority to rule.
- In the new Republic of Zimbabwe, there would be a 100-seat parliament with 20 seats reserved for whites (uncontested). The remaining 80 MPs were to be elected, and it was expected that they would be black, since the vast majority of the population was black.
- Muzorewa would step down as prime minister and the guerrilla war would end.

In the elections which followed, Mugabe's ZANU won a sweeping victory, taking 57 out of the 80 black African seats. This gave him a comfortable overall majority, enabling him to become prime minister when Zimbabwe officially became independent in April 1980. The transference to black majority rule was welcomed by all African and Commonwealth leaders as a triumph of common sense and moderation. ZAPU and ZANU merged in 1987, when Mugabe became the country's first executive president. He was re-elected for a further term in March 1996, not without controversy, and was still clinging on to power in 2012, at the age of 87 (see Section 25.12).

24.5 THE END OF THE FRENCH EMPIRE

The main French possessions at the end of the Second World War were:

- Syria in the Middle East, from which they withdrew in 1946;
- Guadeloupe and Martinique (islands in the West Indies);
- French Guiana (on the mainland of South America);
- Indo-China in south-east Asia;

together with huge areas of North and West Africa:

- Tunisia, Morocco and Algeria (together known as the Maghreb);
- French West Africa;
- French Equatorial Africa;
- the large island of Madagascar off the south-east coast of Africa.

The French began by trying to suppress all nationalist agitation, regarding it as high treason.

As the 1944 Brazzaville Declaration put it:

> The colonising work of France makes it impossible to accept any idea of autonomy for the colonies or any possibility of development outside the French Empire. Even at a distant date, there will be no self-government in the colonies.

But gradually the French were influenced by Britain's moves towards decolonization, and after their defeat in Indo-China in 1954, they too were forced to bow to the 'wind of change'.

(a) Indo-China

Before the war, the French had exercised direct rule over the area around Saigon and had protectorates over Annam, Tonkin, Cambodia and Laos. A protectorate was a country which was officially independent with its own ruler, but which was under the 'protection' or guardianship of the mother country. It usually meant, in practice, that the mother country, in this case France, controlled affairs in the protectorate just as it did in a colony.

During the war, the whole area was occupied by the Japanese, and resistance was organized by the communist *Ho Chi Minh and the League for Vietnamese Independence (Vietminh)*. When the Japanese withdrew in 1945, Ho Chi Minh declared

Vietnam independent. This was unacceptable to the French, and an eight-year armed struggle began which culminated in the French defeat at Dien Bien Phu in May 1954 (see Sections 8.3(a) and 21.2–3). The defeat was a humiliating blow for the French and it caused a political crisis. The government resigned and the new and more liberal premier Pierre Mendès-France, realizing that public opinion was turning against the war, decided to withdraw.

At the Geneva Conference (July 1954) it was agreed that Vietnam, Laos and Cambodia should become independent. Unfortunately this was not the end of the troubles. Although the French had withdrawn, the Americans were unwilling to allow the whole of Vietnam to come under the rule of the communist Ho Chi Minh, and an even more bloody struggle developed (see Section 8.3(b–e)); there were also problems in Cambodia (see Section 9.4(b)).

(b) Tunisia and Morocco

Both these areas were protectorates – Tunisia had a ruler known as the bey, and Morocco had a Muslim king, Mohammed V. But nationalists resented French control and had been campaigning for real independence since before the Second World War. The situation was complicated by the presence of large numbers of European settlers. Tunisia had about 250 000 and Morocco about 300 000 of these in 1945, and they were committed to maintaining the connection with France, which guaranteed their privileged position.

1 Tunisia

In Tunisia the main nationalist group was *the New Destour* led by Habib Bourghiba. They had widespread support among both rural dwellers and townspeople who believed independence would improve their living standards. A guerrilla campaign was launched against the French, who responded by banning New Destour and imprisoning Bourghiba (1952); 70 000 French troops were deployed against the guerrillas, but failed to crush them. The French became aware of a disturbing trend: with Bourghiba and other moderate leaders in jail, the guerrilla movement was becoming more left-wing and less willing to negotiate. Under pressure at the same time in Indo-China and Morocco, the French realized that they would have to give way. With a moderate like Bourghiba at the head of the country, there would be more chance of maintaining French influence after independence. He was released from jail and Mendès-France allowed him to form a government. In March 1956 Tunisia became fully independent under Bourghiba's leadership.

2 Morocco

In Morocco the pattern of events was remarkably similar. There was a nationalist party calling itself *Istiqlal (Independence)*, and King Mohammed himself seemed to be in the forefront of opposition to the French. The new trade unions also played an important role. The French deposed the king (1953), provoking violent demonstrations and a guerrilla campaign. Faced with the prospect of yet another long and expensive anti-guerrilla war, the French decided to bow to the inevitable. The king was allowed to return and Morocco became independent in 1956.

(c) Algeria

It was here that the 'settler' factor had the most serious consequences. There were over a million French settlers (known as *pieds noirs*, 'black feet'), who controlled something like a third of all the most fertile land in Algeria, taken from the original Algerian owners

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during the century before 1940. The whites exported most of the crops they produced and also used some of the land to grow vines for winemaking; this meant there was less food available for the growing African population, whose standard of living was clearly falling. There was an active, though peaceful, nationalist movement led by Messali Hadj, but after almost ten years of campaigning following the end of the Second World War, they had achieved absolutely nothing.

- The French settlers would make no concessions whatsoever, continuing to dominate the economy with their large farms and treating the Algerians as second-class citizens. They firmly believed that fear of the full might of the French army would be enough to dissuade the nationalists from becoming violent.
- Algeria continued to be treated not as a colony or a protectorate, but as an extension or province of metropolitan France itself; but that did not mean that the 9 million Muslim Arab Algerians were treated as equals with ordinary French people. They were allowed no say in the government of their country. Responding to pressure, the French government allowed what appeared to be power-sharing. An Algerian assembly of 120 members was set up, though its powers were limited. But the voting was heavily weighted in favour of the Europeans: the million whites were allowed to vote for 60 members, while the other 60 were chosen by the 9 million Muslim population. Corruption on the part of the Europeans usually meant that they had a majority in the assembly.
- In spite of what had happened in Indo-China, Tunisia and Morocco, no French government dared consider independence for Algeria, since this would incur the wrath of the settlers and their supporters in France. Even Mendès-France declared: 'France without Algeria would be no France.'

Tragically, the stubbornness of the settlers and their refusal even to talk meant that the struggle would be decided by the extremists. Encouraged by the French defeat in Indo-China, a more militant nationalist group was formed – *the National Liberation Front (FLN), led by Ben Bella*, which launched a guerrilla war towards the end of 1954. At the same time, however, they promised that when they came to power, the *pieds noirs* would be treated fairly. On the other hand, the settlers were still confident that with the support of the French army they could overcome the guerrillas. The war gradually escalated as the French sent more forces. By 1960 they had 700 000 troops engaged in a massive anti-terrorist operation. *The war was having profound effects in France itself:*

- Many French politicians realized that even if the army won the military struggle, the FLN still had the support of most of the Algerian people, and while this lasted, *French control of Algeria could never be secure.*
- *The war split public opinion in France* between those who wanted to continue supporting the white settlers and those who thought the struggle was hopeless. At times feelings ran so high that France itself seemed on the verge of civil war.
- The French army, after its defeats in the Second World War and Indo-China, saw the Algerian war as a chance to restore its reputation and refused to contemplate surrender. Some generals were prepared to stage a military coup against any government that decided to give Algeria independence.
- In May 1958, suspecting that the government was about to give way, as it had in Tunisia and Morocco, Generals Massu and Salan organized demonstrations in Algiers and demanded that General de Gaulle should be called in to head a new government. They were convinced that the general, a great patriot, would never agree to Algerian independence. They began to put their plan – codenamed *Resurrection* – into operation, airlifting troops from Algiers into Paris, where it was

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intended that they should occupy government buildings. Civil war seemed imminent; the government could see no way out of the deadlock and consequently resigned. De Gaulle cleverly used the media to reinforce his case; he condemned the weakness of the Fourth Republic and its 'regime of the parties', which he claimed was incapable of dealing with the problem. Then, looking back to 1940, he said: 'Not so long ago, the country, in its hour of peril, trusted me to lead it to salvation. Today, with the trials that face it once again, it should know that I am ready to assume the powers of the Republic.'

President Coty called upon de Gaulle, who agreed to become prime minister on condition that he could draw up a new constitution. This turned out to be *the end of the Fourth Republic*. Historians have had a great debate about the role of de Gaulle in all this. How much had he known about Resurrection? Had he or his supporters actually planned it themselves so that he could return to power? Was he simply using the situation in Algeria as a way of destroying the Fourth Republic, which he thought was weak? What does seem clear is that he knew about the plan and had dropped hints to Massu and Salan that if President Coty refused to allow him to take power, he would be happy for Resurrection to go ahead so that he could take power in that way.

- De Gaulle soon produced his new constitution, giving the president much more power, and he was elected president of the Fifth Republic (December 1958), a position he held until his resignation in April 1969. His enormous prestige was demonstrated when a referendum was held on the new constitution – in France itself, over 80 per cent voted in favour, while in Algeria, where Muslim Algerians were allowed to vote on equal terms with whites for the first time, over 76 per cent were in favour.

Having gained power, de Gaulle was now expected to deliver a solution. But how could he possibly achieve this when any attempt at compromise would be seen as total betrayal by the very people who had helped him to power? But de Gaulle was the great pragmatist. As the vicious fighting continued, with both sides committing atrocities, he must have realized that outright military victory was out of the question. He no doubt hoped that his popularity would enable him to force a settlement. When he showed a willingness to negotiate with the FLN, the army and the settlers were incensed; this was not what they had expected from him. Led by General Salan, they set up *l'Organisation de l'Armée Secrète (OAS)* in *(1961)*, which began a terrorist campaign, blowing up buildings and murdering critics both in Algeria and in France. Several times they attempted to assassinate de Gaulle; in August 1962, after independence had been granted, he and his wife narrowly escaped death when their car was riddled with bullets. When it was announced that peace talks would begin at Evian, the OAS seized power in Algeria. This was going too far for most French people and for many of the army too. When de Gaulle appeared on television dressed in his full general's uniform and denounced the OAS, the army split, and the rebellion collapsed.

The French public was sick of the war and there was widespread approval when Ben Bella, who had been in prison since 1956, was released to attend peace talks at Evian. *It was agreed that Algeria should become independent in July 1962*, and Ben Bella was elected as its first president the following year. About 800 000 settlers left the country and the new government took over most of their land and businesses. The aftermath of the struggle was savage. Algerian Muslims who had remained loyal to France, including some 200 000 who had served in the French army, were now denounced by the FLN as traitors. Nobody knows how many were executed or murdered, but some estimates put the total as high as 150 000. Some historians have criticized de Gaulle for his handling of the Algerian situation and for the enormous bloodshed that was caused. Of all the wars of independence

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waged against a colonial power, this was one of the most bloody. Yet, given the intransigence of the white settlers and the rebel elements of the army, and eventually that of the FLN, it is difficult to imagine any other politician who could have handled it any better. It may have been a flawed process, but arguably it was one that saved France from civil war.

(d) The rest of the French Empire

The French possessions in Africa south of the Sahara were:

- **French West Africa**, consisting of eight colonies: Dahomey, Guinea, Ivory Coast, Mauretania, Niger, Senegal, Sudan and Upper Volta;
- **French Equatorial Africa**, consisting of four colonies: Chad, Gabon, Middle Congo and Oubangui-Shari;
- a third group consisting of **Cameroun** and **Togo** (former German colonies given to France to be looked after as mandates in 1919), and the island of **Madagascar**.

French policy after 1945 was to treat these territories as if they were part of France. Yet this was a sham, since the Africans were not treated on equal terms with Europeans, and any moves towards more privileges for the Africans were opposed by the French settlers. In 1949 the French government decided to clamp down on all nationalist movements, and many nationalist leaders and trade unionists were arrested. Often they were denounced as communist agitators, though without much evidence to support the accusations.

Gradually the French were forced by events in Indo-China and the Maghreb, together with the fact that Britain was preparing the Gold Coast and Nigeria for independence, to change their policy. *In 1956 the 12 colonies of West and Equatorial Africa were each given self-government for internal affairs, but they continued to press for full independence.*

When de Gaulle came to power in 1958 he proposed a new plan, hoping to keep as much control over the colonies as possible:

- the 12 colonies would continue to have self-government, each with its own parliament for local affairs;
- they would all be members of a new union, *the French Community*, and France would take all important decisions about taxation and foreign affairs;
- all members of the community would receive economic aid from France;
- there would be a referendum in each colony to decide whether the plan should be accepted or not;
- colonies opting for full independence could have it, but would receive no French aid.

De Gaulle was confident that none of them would dare face the future without French help. He was almost right: 11 colonies voted in favour of his plan, but one, *Guinea, under the leadership of Sékou Touré, returned a 95 per cent vote against the plan.* Guinea was given independence immediately (1958), but all French aid was stopped. However, Guinea's brave stand encouraged the other 11, as well as Togo, Cameroun and Madagascar: they all demanded full independence and de Gaulle agreed. They all became independent republics during 1960. However, this new independence was not quite so complete as the new states had hoped: *de Gaulle was intent on neo-colonialism* – all the states except Guinea found that France still influenced their economic and foreign policies, and any independent action was almost out of the question.

Three French possessions outside Africa – Martinique, Guadeloupe and French Guiana – were not given independence. They continued to be treated as extensions of the mother country and their official status was 'overseas départements' (a sort of county or province). Their peoples voted in French elections and their representatives sat in the French National Assembly in Paris.

24.6 THE NETHERLANDS, BELGIUM, SPAIN, PORTUGAL AND ITALY

All these colonial powers, with the exception of Italy, were, if anything, even more determined than France to hold on to their overseas possessions. This was probably because, being less wealthy than Britain and France, they lacked the resources to sustain neo-colonialism. There was no way that they would be able to maintain the equivalent of the British Commonwealth or the French influence over their former colonies, against competition from foreign capital.

(a) The Netherlands

Before the Second World War, the Netherlands had a huge empire in the East Indies including the large islands of Sumatra, Java and Celebes, West Irian (part of the island of New Guinea) and about two-thirds of the island of Borneo (see Map 24.3). They also owned some islands in the West Indies, and Surinam on the mainland of South America, between British and French Guiana.

It was in the valuable East Indies that the first challenge came to Dutch control, even before the war. The Dutch operated in a way similar to the French in Algeria – they grew crops for export and did very little to improve the living standards of the East Indians. Nationalist groups campaigned throughout the 1930s, and many leaders, including Ahmed Sukarno, were arrested. When the Japanese invaded in 1942, they released Sukarno and others and allowed them to play a part in the administration of the country, promising independence when the war was over. With the Japanese defeat in 1945, *Sukarno declared an independent Republic of Indonesia*, not expecting any resistance from the Dutch, who had been defeated and their country occupied by the Germans. However, Dutch troops soon arrived and made determined efforts to regain control. Although the Dutch had some success, the war dragged on, and they were still a long way from complete victory in 1949, when they at last decided to negotiate. *Reasons for their decision were the following.*

- The expense of the campaign was crippling for a small country like the Netherlands.
- Outright victory still seemed a long way off.
- They were under strong pressure from the UN to reach agreement.
- Other countries, including the USA and Australia, were pressing the Dutch to grant independence so that they could exert their influence in the area, once exclusive Dutch control ended.
- The Dutch hoped that by making concessions, they would be able to preserve the link between Holland and Indonesia and maintain some influence.

The Netherlands agreed to recognize the independence of the United States of Indonesia (1949) with Sukarno as president, but not including West Irian. Sukarno agreed to a Netherlands–Indonesia Union under the Dutch crown, and Dutch troops were withdrawn. However, the following year Sukarno broke away from the Union and began to pressurize the Dutch to hand over West Irian, seizing Dutch-owned property and expelling Europeans. Eventually in 1963, the Dutch gave way and allowed West Irian to become part of Indonesia.

Important developments took place in 1965 when Sukarno was overthrown in a right-wing military coup, apparently because he was thought to be too much under the influence of communist China and the Indonesian Communist Party – the largest communist party outside the USSR and China. The USA, operating via the CIA, was involved in the coup, because they did not like Sukarno's toleration of the Communist Party, or the way in which he was acting as leader of the non-aligned and anti-imperialist movements of the Third World. The Americans welcomed Sukarno's successor, General Suharto, who obligingly introduced what he called his 'New Order'. This involved a purge of communists, during which at least half a million people were murdered, and the Communist Party was broken. The regime had all the hallmarks of a brutal military dictatorship, but there were few protests from the West because, in the Cold War atmosphere, Suharto's anti-communist campaign was perfectly acceptable. Of the other Dutch possessions, Surinam was allowed to become an independent republic in 1975; the West Indian islands were treated as part of the Netherlands, though allowed some control over their internal affairs.

(b) Belgium

Belgian control of their African possessions, the Belgian Congo and Ruanda-Urundi, ended in chaos, violence and civil war. *The Belgians thought that the best ways to preserve their control were as follows.*

- Denying the Africans any advanced education. This would prevent them from coming into contact with nationalist ideas and deprive them of an educated professional class who could lead them to independence.
- Using tribal rivalries to their advantage by playing off different tribes against each other. This worked well in the huge Congo, which contained about 150 tribes; men from one tribe would be used to keep order in another tribal area. In Ruanda-Urundi the Belgians used the Tutsi tribe to help them control the other main tribal group, the Hutu.

In spite of all these efforts, nationalist ideas still began to filter in from neighbouring French and British colonies.

1 The Belgian Congo

The Belgians seemed taken by surprise when widespread rioting broke out (January 1959) in the capital of the Congo, Leopoldville. The crowds were protesting against unemployment and declining living standards, and disorder soon spread throughout the country.

The Belgians suddenly changed their policy and announced that the Congo could become independent in six months. This was inviting disaster: the Belgians' own policies meant that there was no experienced group of Africans to which power could be handed over; the Congolese had not been educated for professional jobs – there were only 17 graduates in the entire country, and there were no African doctors, lawyers, engineers or officers in the army. *The Congolese National Movement (MNC),* led by *Patrice Lumumba*, had been in existence less than a year. The huge size of the country and the large number of tribes would make it difficult to govern. Six months was far too short a time to prepare for independence.

Why did the Belgians take this extraordinary decision?

- They were afraid of further bloodshed if they hesitated; there were over 100 000 Belgians in the country, who could be at risk.
- They did not want to face the expense of a long anti-guerrilla campaign like the one dragging on in Algeria.

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- They hoped that granting independence immediately while the Congo was weak and divided would leave the new state completely helpless; it would be dependent on Belgium for support and advice, and so Belgian influence could be preserved.

The Congo became independent on 30 June 1960 with Lumumba as prime minister and Joseph Kasavubu, the leader of a rival nationalist group, as president. Unfortunately everything went wrong shortly after independence and the country was plunged into a disastrous civil war (see Section 25.5). Order was not restored until 1964.

2 Ruanda-Urundi

The other Belgian territory, *Ruanda-Urundi*, was given independence in 1962 and divided into two states – Rwanda and Burundi, both governed by members of the Tutsi tribe, as they had been throughout the colonial period. Neither of the states had been properly prepared, and after independence, both had a very unsettled history of bitter rivalry and violence between the Tutsis and the Hutus (see Section 25.7).

(c) Spain

Spain owned some areas in Africa: the largest was Spanish Sahara, and there were also the small colonies of Spanish Morocco, Ifni and Spanish Guinea. General Franco, the right-wing dictator who ruled Spain from 1939 until 1975, showed little interest in the colonies.

- When nationalist movements developed, he did not resist long in the case of *Spanish Morocco*: when the French gave independence to French Morocco (1956), Franco followed suit and Spanish Morocco became part of Morocco. The other two small colonies had to wait much longer;
- *Ifni* was allowed to join Morocco, but not until 1969;
- *Guinea* became independent as Equatorial Guinea in 1968.

Spanish Sahara

Here Franco resisted even longer, because the country was a valuable source of phosphates. Only after Franco's death in 1975 did the new Spanish government agree to release Sahara. Unfortunately the process was badly bungled: instead of making it into an independent state ruled by its nationalist party, *the Polisario Front*, it was decided to divide it between its two neighbouring states, Morocco and Mauretania. The Polisario Front, under its leader, Mohamed Abdelazia, declared the Democratic Arab Republic of Sahara (1976), which was recognized by Algeria, Libya, the communist states and India. Algeria and Libya sent help and in 1979 Mauretania decided to withdraw, making it easier for Sahara to struggle on against Morocco. However, the fact that Sahara had been officially recognized by the USSR was enough to arouse American suspicions. Just when it seemed that the Moroccans too were prepared to negotiate peace, the new American president, Ronald Reagan, encouraged them to continue the fight, stepping up aid to Morocco.

The war dragged on through the 1980s; yet another new Third World country had become a victim of superpower self-interest. In 1990 the UN proposed that a referendum should be held so that the people of Sahara could choose whether to be independent or become part of Morocco. Both sides signed a ceasefire, but the referendum was never held; during the 1990s the Polisario forces grew weaker as support was withdrawn by Algeria and Libya, mainly because they were preoccupied with their own problems. Sahara remained under Moroccan control and large numbers of Moroccan settlers began

to move in. At the same time many Saharans, including Polisario fighters, moved out of the country and were forced to live in refugee camps in Algeria.

(d) Portugal

The main Portuguese possessions were in Africa: the two large areas of *Angola* and *Mozambique*, and the small West African colony of *Portuguese Guinea*. They also still owned the eastern half of the island of Timor in the East Indies. The right-wing Portuguese government of Dr Salazar blithely ignored nationalist developments in the rest of Africa, and for many years after 1945 the Portuguese colonies seemed quiet and resigned to their position. They were mainly agricultural; there were few industrial workers and the black populations were almost entirely illiterate. In 1956 there were only 50 Africans in the whole of Mozambique who had received any secondary education. Though nationalist groups were formed in all three colonies in 1956, they remained insignificant. *Several factors changed the situation.*

- By 1960 the nationalists were greatly encouraged by the large number of other African states winning independence.
- The Salazar regime, having learned nothing from the experiences of the other colonial powers, stepped up its repressive policies, but this only made the nationalists more resolute.
- Fighting broke out first in Angola (1961), where Agostinho Neto's *MPLA (People's Movement for Angolan Liberation)* was the main nationalist movement. Violence soon spread to Guinea, where Amilcar Cabral led the resistance, and to Mozambique, where the FRELIMO guerrillas were organized by Eduardo Mondlane.
- The nationalists, who all had strong Marxist connections, received economic and military aid from the Communist bloc.
- The Portuguese army found it impossible to suppress the nationalist guerrillas; the troops became demoralized and the cost escalated until by 1973 the government was spending 40 per cent of its budget fighting three colonial wars at once.
- Still the Portuguese government refused to abandon its policy; but public opinion and many army officers were sick of the wars, and in 1974 the Salazar dictatorship was overthrown by a military coup.

Soon all three colonies were granted independence: Guinea took the name Guinea-Bissau (September 1974) and Mozambique and Angola became independent the following year. This caused a serious crisis for Rhodesia and South Africa; they were now the only states left in Africa ruled by white minorities, and their governments felt increasingly threatened.

Now it was the turn of Angola to become a victim of outside interference and the Cold War. South African troops immediately invaded the country in support of UNITA (National Union for the Total Independence of Angola), while General Mobutu of Zaire, with American backing, launched another invasion in support of the FNLA (National Front for the Liberation of Angola). The Americans thought that a joint Angolan government of these two groups would be more amenable and open to western influence than the Marxist MPLA. The MPLA received aid in the form of Russian weapons and a Cuban army; this enabled them to defeat both invasion forces by March 1976, and Neto was accepted as president of the new state. This proved to be only a temporary respite – further invasions followed and Angola was torn by civil war right through into the 1990s (see Section 25.6). The South Africans also interfered in Mozambique, sending raiding parties over the border and doing their best to destabilize the FRELIMO government. Again the country was torn by civil war for many years (see Section 9.4(c)).

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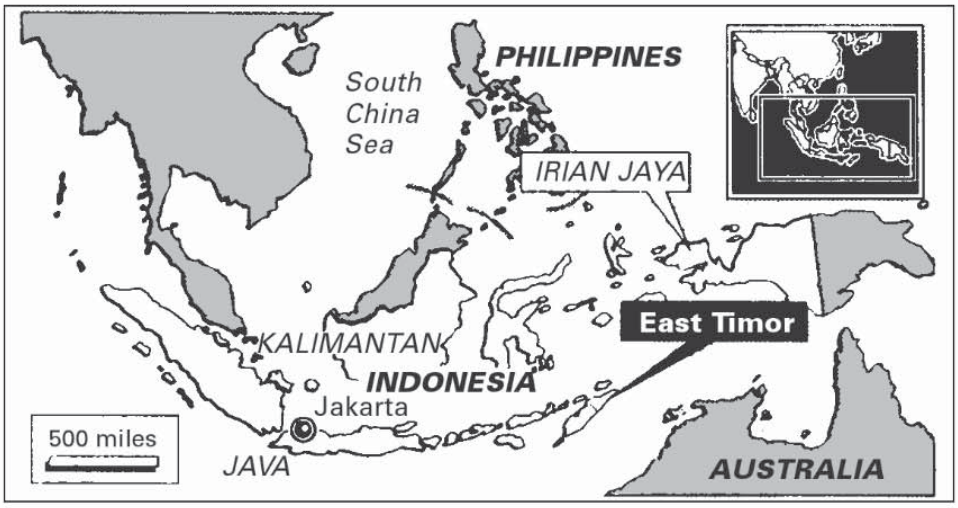
East Timor

One other Portuguese territory deserves mention: East Timor was half of a small island in the East Indies (see Map 24.6); the western half belonged to the Netherlands and became part of Indonesia in 1949. East Timor's nationalist movement (FRETILIN) won a short civil war against the ruling group, which wanted to stay with Portugal (September 1975). The USA denounced the new government as Marxist, which was not entirely accurate; after only a few weeks, Indonesian troops invaded, overthrew the government and incorporated East Timor into Indonesia, a sequence of events vividly described in Timothy Mo's novel *The Redundancy of Courage*. The USA continued to supply military goods to the Indonesians, who were guilty of appalling atrocities both during and after the war. It is estimated that about 100 000 people were killed (one-sixth of the population) while another 300 000 were put into detention camps.

FRETILIN continued to campaign for independence, but although the UN and the EU condemned Indonesia's action, East Timor was apparently too small and too unimportant, and the nationalists too left-wing to warrant any sanctions being applied against Indonesia by the West. The USA consistently defended Indonesia's claim to East Timor and played down the violence. In November 1991, for example, 271 people were killed in Dili, the capital, when Indonesian troops attacked a pro-independence demonstration. However, this incident helped to focus international attention on the campaign against Indonesian abuses of human rights and against US and UK arms sales to Indonesia. In 1996, the Roman Catholic Bishop of Dili, Carlos Belo, and exiled FRETILIN spokesman José Ramos-Horta, were jointly awarded the Nobel Peace Prize, in recognition of their long, non-violent campaign for independence.

By 1999, with international support for East Timor mounting, and the Cold War long since over, Indonesia at last began to give way and offered to allow a referendum on 'special autonomy' for East Timor. This was organized by the UN and took place in August 1999, resulting in an almost 80 per cent vote for complete independence from Indonesia. However, the pro-Indonesian minority did their best to sabotage the elections; as voting took place, their militia, backed by Indonesian troops, did everything they could to intimidate voters and throw the whole country into chaos. After the result was announced, they ran wild in a furious outburst of revenge and destruction, killing 2000 and leaving 250 000 homeless. Violence was only ended by the arrival of a large Australian peacekeeping force.

Two years later, in August 2001, when elections were held for the Constituent Assembly, the situation was much calmer. FRETILIN won by a large majority and their



Map 24.6 **Indonesia and East Timor**

Source: *The Guardian*, 20 April 1996.

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leader, Xanana Gusmao, was elected as the first president. In May 2002, East Timor received international recognition as an independent state after a struggle lasting more than a quarter of a century.

(e) Italy

It was officially decided in 1947 that the Italians, having supported Hitler and suffered defeat in the Second World War, must lose their overseas empire. Their African possessions were to be administered by France and Britain until the UN decided what to do with them. The UN followed a policy of placing the territories under governments which would be sympathetic to western interests.

- *Ethiopia* was handed back to the rule of the Emperor Haile Selassie, who had been forced into exile when the Italians invaded Ethiopia (Abyssinia) in 1935.
- *Libya* was given independence under King Idris (1951).
- *Eritrea* was made part of Ethiopia (1952) but it was to have a large measure of self-government within a federal system.
- *Italian Somaliland* was merged with British Somaliland to form the independent state of Somalia (1960).

Some of these arrangements did not prove to be very successful. Both Idris and Selassie became unpopular with their peoples, Idris because he was thought to be too pro-West, and Selassie because he made no attempt to modernize Ethiopia and did little to improve the living standards of his people. He also made the mistake of cancelling Eritrea's rights of self-government (1962), which prompted the Eritreans into launching a war for independence. Idris was overthrown in 1969 by a socialist revolutionary movement, which nationalized the oil industry and began to modernize the country. Selassie was overthrown in 1974. New leaders soon emerged – Colonel Gaddafi in Libya and Colonel Mengistu in Ethiopia, both of whom turned to the USSR for economic aid. Mengistu seemed to have the more serious problems. He made the mistake of refusing to come to terms with the Eritreans and was faced with other provinces – Tigre and Ogaden – also wanting independence. As he struggled to suppress all these breakaway movements, military expenditure soared and his country sank into even deeper poverty and famine (see Section 25.9).

24.7 VERDICT ON DECOLONIZATION

Although some states, particularly Britain (with the exception of Kenya), handled decolonization better than others, in general it was not a pleasant experience for the colonies, and there was no simple happy ending. There were some gains for the new states, which now had much more control over what went on inside their frontiers; and there were some gains for ordinary people, such as advances in education and social services, and a political culture which allowed them to vote. However, it soon became fashionable to dismiss the entire colonial and imperial experience as a disaster, in which European nations, with supreme arrogance, imposed control over their subject peoples, exploited them ruthlessly and then withdrew unwillingly, leaving them impoverished and facing new problems. Piers Brendon points out that this was not really surprising, since 'the British Empire's real purpose was not to spread sweetness and light but to increase Britain's wealth and power. Naturally its coercive and exploitative nature must be disguised.' The same applied to other European empires, except perhaps that they were not as good as the British in disguising it. George Orwell remarked that empire was 'a despotism with theft as its final

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object'. Bertrand Russell called the British Empire 'a cesspool for British moral refuse', by which he apparently meant that many of the British administrators and officials were racist bullies.

There is plenty of evidence to support this negative view of colonialism. Although by no means all officials were racist bullies, there is no doubt that most of them treated the native peoples with arrogance, and considered them to be inferior beings or lesser breeds. After the Indian Mutiny of 1857, the army vowed to spill 'barrels and barrels of the filth that flows in these niggers' veins for every drop of blood' that they had shed. Piers Brendon shows that 'the history of India is punctuated by famines which caused tens of millions of deaths'. During a severe famine in Bengal in 1942–3, Churchill refused to divert shipping to take food supplies to Calcutta. The result – over 3 million people died from starvation. Much more can be added to the debit list: the slaughter of thousands of Aborigines in Australia and Maoris in New Zealand; during the Boer War (1899–1902) in South Africa, the British set up concentration camps in which about one-sixth of the entire Boer population died. Whenever there was any resistance, retribution was usually swift and disproportionate: Afghanistan, Ceylon, Jamaica, Burma, Kenya and Iraq were all ruthlessly subjugated. One of the latest historians to pronounce on imperialism is Richard Gott, in his book *Britain's Empire: Resistance, Repression and Revolt* (2012). He goes along with what is probably the majority view, presenting a long catalogue of crimes against humanity committed by British imperialists: slavery, famine, prison, repression, battles, massacre, devastation and extermination; it makes depressing reading.

What about the supposed benefits that imperialism was claimed to have brought? The evidence suggests that, at best, these were thinly spread.

- *Neo-colonialism* meant that western European countries and the USA still exerted a great deal of control over the new states, which continued to need the markets and the investment that the West could provide.
- *Many new states, especially in Africa, had been badly prepared or not prepared at all for independence.* Their frontiers were often artificial ones forced on them by the Europeans and there was little incentive for different tribes to stay together. In Nigeria and the Belgian Congo tribal differences helped to cause civil war. When the British withdrew from Nyasaland (Malawi) there were only three secondary schools for 3 million Africans, and not one single industrial factory. When the Portuguese were forced to withdraw from Mozambique, they deliberately destroyed installations and machinery in revenge.
- Although the people of the newly independent states were now able to vote, *in most cases, the governments which took over were run by the local political elite groups.* There was no social revolution and no guarantee that ordinary people would be any better off. Many historians, including Ellen M. Wood, have pointed out that their new political rights and citizenship were essentially passive. People were allowed to vote from time to time, but in practice it hardly made any difference to the way the country was run. 'The whole point of this strategy', she writes, 'is to put formal political rights in place of social rights, and to put as much of social life as possible out of the reach of democratic accountability.'

  In countries where new governments *were* prepared to introduce socialist policies (nationalizing resources or foreign businesses), or where governments showed any sign of being pro-communist, the western countries disapproved. They often responded by cutting off aid or helping to destabilize the government, and in some cases, even overthrowing governments. This happened in Indo-China, Indonesia, East Timor, Chad, Angola, Mozambique, Zaire and Jamaica. For example, in 1974 when Portugal withdrew from East Timor, the indigenous population opted to become independent. But the Indonesian leader, General Suharto, claimed East

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Timor for Indonesia. The leading political party in East Timor, known as FRETILIN, was thought to be Marxist, so that an independent East Timor might have socialist or even communist leanings. Consequently US president Gerald Ford gave Suharto the go-ahead: Indonesian troops move into East Timor to force the people to submit to Indonesian rule. They resisted stoutly, and there was a long campaign of terror in which around 200 000 people were killed out of a total population of only 700 000. Only in 1999 did the UN intervene and helped East Timor to gain its independence. Similar Cold War interventions took place in many countries in Central and South America which had gained their independence much earlier, in the nineteenth century (see Chapter 26).

- *All the Third World states faced intense poverty.* They were economically underdeveloped and often relied on exports of only one or two commodities; a fall in the world price of their product was a major disaster. Loans from abroad left them heavily in debt (see Section 26.2). As usual, Africa was worst hit: it was the only area of the world where, in 1987, incomes were on average lower than in 1972.

On the other hand, in 2003, historian Niall Ferguson brought out a strong defence of the British Empire and its legacy. While admitting that Britain's record as a colonial power was not without blemish, he argued that the benefits of British rule were considerable. In the nineteenth century the British 'pioneered free trade, free capital movements and, with the abolition of slavery, free labour'. In addition they developed a global network of modern communications, spread a system of law and order and 'maintained a global peace unmatched before or since'. When the Empire came to an end, the former British territories were left with the successful structures of liberal capitalism, the institutions of parliamentary democracy and the English language, which today is a vitally important medium of global communication. 'What the British Empire proved', Ferguson concludes controversially, 'is that empire is a form of international government which can work – and not just for the benefit of the ruling power. It sought to globalize not just an economic but a legal and ultimately a political system too.'

In conclusion, it seems fair to say that so many limitations were placed on the independence given to the former colonies after the Second World War that the result was to divide people's political rights from any chance of expressing their rights in social and economic affairs. True, they were now able to vote, but this did not necessarily enable them to improve their standards of living, since governments were still dominated by wealthy privileged elites. Canadian historian Anthony J. Hall calls this 'the great betrayal of humanity's democratic promise'. Kwame Nkrumah, the leader of the newly independent Ghana, described it well in his book *Neo-Colonialism.* Criticizing the growing power of global capitalism, he wrote: 'For those who practise neo-colonialism, it means power without responsibility and for those who suffer from it, it means exploitation without redress.' In 1946 there were 74 nation-states on the planet; in 1995, thanks to decolonization, the number had risen to 192. In the words of Anthony J. Hall:

> There was much unevenness, however, in the outcomes from this process of decolonization. Indeed the evidence is overwhelming that the frontier expansions of global corporations, along with the exercise of coercive authority centred in the military–industrial complex [see Section 23.3(b)] of the United States, intensifies the disparities of wealth and power that continue to reside at the very core in its most essential sense. Class exploitation and colonial exploitation are two sides of the same coin … [it all tends] to favour the interests of small, local oligarchies rather than to deliver on the ideals of broad-ranging liberation that the winds of change seemed initially to promise.

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QUESTIONS

1 'Without de Gaulle's masterly handling of the situation, the Algerian crisis would probably have plunged France into civil war. How far would you agree with this verdict on President de Gaulle's contribution to the events leading to Algerian independence?

2 'Decolonization did not bring the benefits for the majority of the African people which they had hoped for.' Explain why you agree or disagree with this assessment of decolonization in Africa.

3 'Indian independence was not a gift from the British; it was the hard-won fruit of struggle and sacrifice.' Explain whether you think this is an accurate verdict on India's progress towards independence.

4 Explain why it was thought necessary to divide India, creating the separate state of Pakistan.

5 Assess the reasons for the growth of nationalism in the European colonies after the Second World War. How important was nationalism in bringing about decolonization?

There is a document question about the Kenyan struggle for independence on the website.

Chapter

25 Problems in Africa

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SUMMARY OF EVENTS

After achieving independence, the new African nations faced similar problems. It is not possible in the limited space available to look at events in every state in Africa. The following sections examine the problems common to all the states, and show what happened in some of the countries which experienced one or more of these problems. For example:

- *Ghana* suffered economic problems, the failure of democracy and several coups.
- *Nigeria* experienced civil war, a succession of military coups and brutal military dictatorship.
- *Tanzania* – extreme poverty.
- *The Congo* – civil war and military dictatorship.
- *Angola* – civil war prolonged by outside interference.
- *Burundi and Rwanda* – civil war and horrifying tribal slaughter.
- *South Africa* was a special case: after 1980, when Rhodesia (Zimbabwe) gained its independence, South Africa was the last bastion of white rule on the continent of Africa, and the white minority was determined to hold out to the bitter end against black nationalism. Gradually the pressures became too much for the white minority, and in May 1994 Nelson Mandela became the first black president of South Africa.
- *Liberia, Ethiopia, Sierra Leone and Zimbabwe* also had their own special problems.
- In the mid-1980s most of the countries of Africa began to experience HIV/AIDS, which by 2004 had reached pandemic proportions, especially in sub-Saharan Africa. Some 28 million people – about 8 per cent of the population – were HIV positive.

25.1 PROBLEMS COMMON TO THE AFRICAN STATES

(a) Tribal differences

They each contained a number of different tribes which had only been held together by the foreign colonial rulers and which had united in the nationalist struggle for freedom from the foreigners. As soon as the Europeans withdrew, there was little incentive to stay together, and they tended to regard loyalty to the tribe as more important than loyalty to their new nation. In Nigeria, the Congo (Zaire), Burundi and Rwanda, tribal differences became so intense that they led to civil war.

(b) They were economically under-developed

In this, they were like many other Third World states. Most African states had very little industry; this had been a deliberate policy by the colonial powers, so that Africans would have to buy manufactured goods from Europe or the USA; the role of the colonies had been to provide food and raw materials. After independence they often relied on only one or two commodities for export, so that a fall in the world price of their products was a major disaster. Nigeria, for example, relied heavily on its oil exports, which produced about 80 per cent of its annual income. There was a shortage of capital and skills of all kinds, and the population was growing at a rate of over 2 per cent a year. Loans from abroad left them heavily in debt, and as they concentrated on increasing exports to pay for the loans, food for home consumption became scarcer. All this left the African nations heavily dependent on western European countries and the USA for both markets and investment and enabled those countries to exert some control over African governments (neo-colonialism). In the atmosphere of the Cold War, some states suffered direct military intervention from countries which did not like their government, usually because they were thought to be too left-wing and under Soviet influence. This happened to Angola, which found itself invaded by troops from South Africa and Zaire because those countries disapproved of Angola's Marxist-style government.

(c) Political problems

African politicians lacked experience of how to work the systems of parliamentary democracy left behind by the Europeans. Faced with difficult problems, they often failed to cope, and governments became corrupt. Most African leaders who had taken part in guerrilla campaigns before independence had been influenced by Marxist ideas, which often led them to set up one-party states as the only way to achieve progress. In many states, such as Kenya and Tanzania, this worked well, providing stable and effective government. On the other hand, since it was impossible to oppose such governments by legal means, violence was the only answer. Military coups to remove unpopular rulers became common. President Nkrumah of Ghana, for example, was removed by the army in 1966 after two assassination attempts had failed. Where the army was unable or unwilling to stage a coup, such as in Malawi, the one-party system flourished at the expense of freedom and genuine democracy.

(d) Economic and natural disasters

In the 1980s the whole of Africa was beset by economic and natural disasters. The world recession reduced demand for African exports such as oil, copper and cobalt, and there was a severe drought (1982–5) which caused crop failures, deaths of livestock, famine and starvation. The drought ended in 1986 and much of the continent had record harvests that year. However, by this time, Africa, like the rest of the world, was suffering from a severe debt crisis, and at the same time had been forced by the International Monetary Fund (IMF) to economize drastically in return for further loans. In a number of cases the IMF prescribed the ESAP (Economic Structural Adjustment Programme) which the country had to follow. Often this forced them to devalue their currency, and reduce food price subsidies, which led to increased food prices at a time when unemployment was rising and wages were falling. Governments were also forced to cut their spending on education, health and social services as part of the austerity programme. Table 26.2 in the next chapter shows how poor most of the African states were in comparison with the rest of the world.

25.2 DEMOCRACY, DICTATORSHIP AND MILITARY GOVERNMENT IN GHANA

Kwame Nkrumah ruled Ghana from the time the country gained independence in 1957 until his removal by the army in 1966.

(a) His initial achievements were impressive

He was a socialist in outlook and wanted his people to enjoy a higher standard of living, which would come from efficient organization and industrialization. Production of cocoa (Ghana's main export) doubled, forestry, fishing and cattle-breeding expanded, and the country's modest deposits of gold and bauxite were more effectively exploited. The building of a dam on the River Volta (begun 1961) provided water for irrigation and hydro-electric power, producing enough electricity for the towns as well as for a new plant for smelting Ghana's large deposits of bauxite. Government money was provided for village projects in which local people built roads and schools.

Nkrumah also gained prestige internationally: he strongly supported *the pan-African movement*, believing that only through a federation of the whole continent could African power make itself felt. As a start, an economic union was formed with Guinea and Mali, though nothing much came of it, while his dream of an African federal state quickly faded (see Section 24.1(c)). He supported *the Organization of African Unity* (set up in 1963), and usually played a responsible role in world affairs, keeping Ghana in the Commonwealth; in 1961 Queen Elizabeth II made a state visit to Ghana. At the same time Nkrumah forged links with the USSR, East Germany and China.

(b) Why was Nkrumah overthrown?

He tried to introduce industrialization too quickly and borrowed vast amounts of capital from abroad, hoping to balance the budget from increased exports. Unfortunately Ghana was still uncomfortably dependent on cocoa exports, and a steep fall in the world price of cocoa left her with a huge balance-of-payments deficit. The smelting plant was a disappointment because the American corporation that built and owned it insisted on buying bauxite from abroad instead of using Ghanaian bauxite. There was criticism that too much money was being wasted on unnecessary projects, like the ten-mile stretch of motorway from Accra (the capital) to Tema, and some grandiose building projects.

Probably the most important reason for his downfall was that he gradually began to abandon parliamentary government in favour of a one-party state and personal dictatorship. He justified this on the grounds that the opposition parties, which were based on tribal differences, were not constructive and merely wanted more power in their own areas. They had no experience of working a parliamentary system, and as Nkrumah himself wrote: 'Even a system based on a democratic constitution may need backing up in the period following independence by emergency measures of a totalitarian kind.'

From 1959 onwards, opponents could be deported or imprisoned for up to five years without trial. Even the respected opposition leader, J. B. Danqua, was arrested in 1961 and died in prison. In 1964 all parties except Nkrumah's were banned, and even within his own party no criticism was allowed. He began to build up the image of himself as the 'father of the nation'. Slogans such as 'Nkrumah is our Messiah, Nkrumah never dies' were circulated, and numerous statues of the 'saviour' were erected. This struck many people as absurd, but Nkrumah justified it on the grounds that the population could identify itself

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better with a single personality as leader than with vague notions of the state. All this, plus the fact that he was believed to have amassed a personal fortune through corruption, was too much for the army, which seized control when Nkrumah was on a visit to China (1966). The American CIA gave the coup its full backing, because the USA disapproved of Nkrumah's links with communist states.

The military government promised a return to democracy as soon as a new constitution could be drawn up, complete with safeguards against a return to dictatorship. The constitution was ready in 1969 and the elections returned Dr Kofi Busia, leader of the Progressive Party, as the new prime Minister (October 1969).

(c) Kofi Busia

Dr Busia survived only until January 1972 when he too was overthrown by the army. An academic who had studied economics at Oxford, Busia illustrates perfectly the difficulties of democratically elected politicians trying to maintain political stability in the African situation. In power in the first place only by permission of the army, he had to produce quick results. Yet the problems were enormous – rising unemployment, rising prices, the low price of cocoa on the world market, and massive debts to be repaid. Canada and the USA were prepared to wait for repayment, but other countries, including Britain, were not so sympathetic. Busia, who had a reputation for honesty, genuinely tried to keep up payments, but these were using up about 40 per cent of Ghana's export profits. In 1971 imports were limited and the currency was devalued by nearly 50 per cent. Busia was hampered by the tribal squabbles which re-emerged under conditions of democracy, and the economic situation deteriorated so rapidly that in January 1972, while he was away on a visit to London, the army announced that he had been replaced by a National Redemption Council under the leadership of Colonel Ignatius Acheampong. They too struggled with all the same problems, exacerbated by sharp rises in the price of oil and other imports.

(d) J. J. Rawlings

As Ghana continued to flounder amid her economic problems, Acheampong was himself removed from power by General Fred Akuffo, for alleged corruption. In June 1979, a group of junior officers led by 32-year-old Jerry J. Rawlings, a charismatic air-force officer of mixed Ghanaian and Scottish parentage, seized power on the grounds that corrupt soldiers and politicians needed to be weeded out before a return to democracy. They launched what was described as a 'house-cleaning' exercise in which Acheampong and Akuffo were executed after secret trials. In July, elections were held as a result of which Rawlings returned Ghana to civilian rule with Dr Hilla Limann as president (September 1979).

Limann was no more successful than previous leaders in halting Ghana's economic decline. Corruption was still rife at all levels, and smuggling and hoarding of basic goods were commonplace. During 1981, inflation was running at 125 per cent, and there was widespread labour unrest as wages remained low. Rawlings came to the conclusion that he and some of his associates could do better. Limann was removed in a military coup (December 1981), and Flight-Lieutenant Rawlings became chairman of a Provisional National Defence Council (PNDC). He was rare among military leaders: the army did not want power, he said, but simply to be 'part of the decision-making process' which would change Ghana's whole economic and social system. Though Rawlings remained leader, the PNDC appointed a civilian government of well-known figures from political and academic circles. Ghana suffered badly from the drought in 1983, but there was ample rainfall in 1984, bringing a good maize harvest.

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Reluctantly Rawlings turned to the IMF for help, and though he had to agree to their conditions (austerity measures had to be introduced), the new recovery programme soon seemed to be working. Production rose by 7 per cent, and early in 1985 inflation was down to 40 per cent. As Ghana celebrated 30 years of independence (March 1987), she was still on course for recovery, and Rawlings and his party, the National Democratic Congress (NDC), evoking memories of Nkrumah, were running an apparently successful campaign to unite the 12 million Ghanaians solidly behind them. In the early 1990s Ghana was enjoying one of the highest economic growth rates in Africa. Yet for many people there remained one big criticism: there was no progress towards representative democracy. Rawlings responded in 1991 by calling an assembly to draw up a new constitution, and promised democratic elections in 1992. These duly went ahead (November) and Rawlings himself was elected president for a four-year term, with over 58 per cent of the votes. He was both Head of State and Commander-in-Chief of the Armed Forces. He was re-elected in 1996, but the constitution did not allow him to stand again in 2000. His career had been a remarkable one; seizing power in 1981 at the age of only 36, he remained leader for some 20 years, and gave Ghana a long period of political stability and modest prosperity.

The NDC chose Vice-President J. E. A. Mills as its presidential candidate. His main opponent was John Kufuor, leader of the New Patriotic Party. Mills was expected to win, but Kufuor scored a surprise victory and took over as president in January 2001. The NDC defeat was probably caused by economic problems – there had been a fall in the world prices of cocoa and gold, which were Ghana's two main exports – and by the fact that the popular J. J. Rawlings was no longer the candidate. Kufuor continued the stability and prosperity, and in 2002 he set up a National Reconciliation Commission. He was re-elected in 2004 and remained president until the next election, in December 2008. He concentrated on diversifying Ghana's economy, modernizing agriculture and infrastructure, and encouraging private involvement. Social conditions were improved and the National Health System was reformed. In 2005 the Ghana School Feeding Programme was started – this provided a free hot meal a day for schoolchildren in the poorest areas.

Ghana continued to be regarded as one of the most stable, prosperous and generally successful democracies in the whole of Africa. Kufuor's policies won the approval of the western countries and the US Millennium Challenge Account awarded Ghana a record $500 million grant for economic development. However, Kufuor was not without his critics among whom J. J. Rawlings was prominent. The complaints were that some projects had not been carried through fully and some had been underfunded or not funded at all. In the 2008 elections the NDC candidate, J. E. A. Mills, won the narrowest of victories.

25.3 CIVIL WARS AND CORRUPTION IN NIGERIA

Superficially, Nigeria, which gained independence in 1960, seemed to have advantages over Ghana; it was potentially a wealthy state, extensive oil resources having been discovered in the eastern coastal area. The prime minister was the capable and moderate Sir Abubakar Tafawa Balewa, assisted by the veteran nationalist leader Nnamdi Azikiwe, who was made president when Nigeria became a republic in 1963. However, in 1966 the government was overthrown by a military coup, and the following year civil war broke out and lasted until 1970.

(a) What caused the civil war?

A combination of the problems mentioned in Section 25.1 led to the outbreak.

- Nigeria's tribal differences were more serious than Ghana's, and although the constitution was a federal one, in which each of the three regions (north, east and west) had its own local government, the regions felt that the central government in Lagos did not safeguard their interests sufficiently. Balewa came from the Muslim north where the Hausa and Fulani tribes were powerful; the Yorubas of the west and the Ibos of the south and east were constantly complaining about northern domination, even though Azikiwe was an Ibo.
- To make matters worse there was an economic recession. By 1964 prices had risen by 15 per cent, unemployment was rising and wages were, on average, well below what had been calculated as the minimum living wage. Criticism of the government mounted and Balewa replied by arresting Chief Awolowo, prime minister of the western region, which for a time seemed likely to break away from the federation. The central government was also accused of corruption after blatantly trying to 'fix' the results of the 1964 elections.
- In January 1966 there was a military coup carried out by mainly Ibo officers, in which Balewa and some other leading politicians were killed. After this the situation deteriorated steadily: in the north there were savage massacres of Ibos, who had moved into the region for better jobs. The new leader, General Ironsi, himself an Ibo, was murdered by northern soldiers. When a northerner, Colonel Yakubu Gowon, emerged supreme, almost all the Ibos fled from other parts of Nigeria back to the east, whose leader, Colonel Ojukwu, announced that the eastern region had seceded (withdrawn) from Nigeria to become the independent state of Biafra (May 1967). Gowon launched what he described as a 'short surgical police action' to bring the east back into Nigeria.

(b) The civil war

It took more than a short police action, as the Biafrans fought back vigorously. Britain and the USSR supplied Gowon with arms, and France supplied Biafra. It was a bitter and terrible war, in which Biafra lost more civilians from disease and starvation than troops killed in the fighting. Neither the UN, the Commonwealth, nor the Organization of African Unity was able to mediate, and the Biafrans hung on to the bitter end as Nigerian troops closed in on all sides. The final surrender came in January 1970. Nigerian unity had been preserved.

(c) Recovery after the war was remarkably swift

There were pressing problems: famine in Biafra, inter-tribal bitterness, unemployment, and economic resources strained by the war. Gowon showed considerable statesmanship in this difficult situation. There was no revenge-taking, as the Ibos had feared, and Gowon made every effort to reconcile them, persuading them to return to their jobs in other parts of the country. He introduced a new federal system of 12 states, later increased to 19, to give more recognition of local tribal differences; this was a pragmatic move in a country with so much ethnic diversity. The Nigerians were able to take advantage of rising oil prices in the mid-1970s, which gave them a healthy balance of payments position. In 1975 Gowon was removed by another army group, which probably thought he intended to return the country to civilian rule too early. Nigeria continued to prosper and the army kept its promise of a return to democratic government in 1979. Elections were held, resulting in President Shagari becoming head of a civilian government. With Nigeria's oil much in demand abroad, prosperity seemed assured and prospects for a stable government bright.

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(d) Unfulfilled promise

Unfortunately disappointment was soon to follow: during 1981 the economy got into difficulties. The Nigerians had relied too heavily on oil exports; there was a fall in world oil prices, and the healthy trade balance of 1980 became a deficit in 1983. Although Shagari was elected for another four-year term (August 1983), he was removed by a military coup the following December. According to the new leader, Major-General Bukhari, the civilian government was guilty of mismanagement of the economy, financial corruption and rigging of the election. In August 1985, Bukhari became the victim of yet another coup carried out by a rival group of army officers who complained that he had not done enough to reverse the fall in living standards, rising prices, chronic shortages and unemployment. Simmering in the background was religious unrest between the largely Muslim north and the mainly Christian south.

The new president, Major-General Babangida, began energetically, introducing what he called a 'belt-tightening' campaign, and announcing plans to develop the non-oil side of the economy. He aimed to expand production of rice, maize, fish, vegetable oil and animal products, and to give special priority to steel manufacture and the assembly of motor vehicles. Following the example of Jerry Rawlings in Ghana, he declared that his military government would not remain in power 'a day longer than was absolutely necessary'. A committee of academics was set to work to produce a new constitution which could 'guarantee an acceptable and painless succession mechanism'; October 1990 was fixed as the date for a return to civilian rule. Another blow came in 1986 with a further dramatic fall in oil prices, which in June reached a record low of only $10 a barrel. This was a disaster for the government, which had based its 1986 budget calculations on a price of $23.50 a barrel. It was forced to accept a loan from the World Bank to enable the recovery programme to go ahead.

In spite of the economic problems, local and state elections were held as promised in 1990 and 1991 and there seemed a good chance of a return to democratic civilian rule; in June 1993 Chief Abiola won the presidential election. However, Babangida announced that the election had been annulled because of malpractices, although most foreign observers reported that it had been conducted fairly and peacefully. Babangida's deputy, General Sani Abacha, seized power in a bloodless coup, and Chief Abiola was later arrested.

Abacha's rule soon developed into a repressive military dictatorship with the imprisonment and execution of opposition leaders, which brought worldwide condemnation (November 1995). Nigeria was suspended from the Commonwealth and the UN applied economic sanctions; most countries stopped buying Nigerian oil and aid was suspended, which were further blows to the economy. Abacha meanwhile continued apparently unmoved, maintaining that he would hand power to a democratically elected president in 1998, or when he felt ready. Some opposition groups called for the country to be divided up into separate states; others demanded a looser federal system which would enable them to escape from the appalling Abacha regime. Corruption continued to flourish; it was reported that during Babangida's period of power, over $12 billion in oil revenues had gone missing, and this trend was maintained under Abacha. Nor were such practices confined to the political elite: there was evidence that at every level of activity, bribery was usually necessary to keep the system operating.

It seemed as though military rule might continue indefinitely; then in June 1998 Abacha died unexpectedly. He was replaced by General Abubakar, a northern Muslim, who promised a return to civilian rule as soon as was practical. Political prisoners were released, and political parties allowed to form, in preparation for elections to be held in 1999. Three main parties emerged: the People's Democratic Party (PDP), the All People's Party (a more conservative party based in the north) and the Alliance for Democracy (a

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mainly Yoruba party based in the south-east). The presidential election held in February 1999 was declared by a team of international observers to be fair and free; Olusegun Obasanjo of the PDP was declared the winner and he took over as president in May.

(e) Civilian rule again

President Obasanjo tried hard to make civilian rule a success; he began by retiring many of the military who had held official posts in the administration, and introduced new restrictions designed to eliminate corruption. Nigeria's international image improved and US president Clinton paid a visit in 2000, promising aid to restore the country's infrastructure, which had been allowed to fall into disrepair. However, things did not run smoothly: there was religious and ethnic violence, and the economy did not fulfil its potential.

- There was sporadic violence between different tribal groups. For example, in Nassarawa state, around 50 000 people were forced to flee from their homes after two months of fighting between the dominant Hausa tribe and the Tiv minority.
- The most serious problem was the continuous violence between Muslims and Christians. There had always been hostility between the two, but this was now further complicated by the issue of *Sharia law*. This is a system of Islamic law which imposes severe punishments, including amputation of limbs and death by stoning; for example: for theft – amputation of the right hand for a first offence, left foot for a second offence, left hand for a third, and so on. A man in the state of Zamfara lost his right hand for stealing the equivalent of £25. Punishments are especially severe on women: committing adultery and becoming pregnant outside marriage can bring a sentence of death by stoning. By the end of 2002, 12 of the 19 states – those in the north, which are mainly Muslim – had adopted Sharia law into their legal systems. Sharia was only applied to Muslims, but it was opposed by many Christians, who thought it was barbaric and medieval.

  In the other states, which have Christian majorities, there were violent clashes between Muslims and Christians. The president and the attorney-general, both Christians and southerners, were against the introduction of Sharia law, but were in a difficult situation. With the presidential election due in April 2003, they could not afford to antagonize the northern states. However, the attorney-general did go so far as to declare Sharia law illegal on the grounds that it infringed the rights of Muslims by subjecting them 'to a punishment more severe than would be imposed on other Nigerians for the same offence'. In March 2002 an appeal court overturned the death sentence imposed on a woman in Sokoto state for adultery; but in the same month, a woman in Katsina state was sentenced to death by stoning for having a child out of wedlock. Later in the year a young couple were sentenced to death for having sex outside marriage. These sentences aroused strong international protests; both the European Union and the USA expressed their concern, and the federal government of Nigeria said that it was totally opposed to such sentences.
- There was serious violence in the northern city of Kaduna following the unwise decision to stage the Miss World contest in Nigeria in December 2002. Many Muslims strongly disapproved, but in November an article appeared in the national newspaper, *This Day*, which suggested that the Prophet Mohammed himself would not have objected to the Miss World contest, and would probably have chosen a wife from among the contestants. This outraged Muslim opinion; the offices of *This Day* in Kaduna were destroyed by Muslims, and some churches were burned. Christians retaliated and over 200 people died in the rioting that followed. The Miss World contest was relocated to the UK, and the deputy governor of the northern

state of Zamfara issued a *fatwa* (formal decision) urging Muslims to kill Isioma Daniel, the writer of the article.

- Early in 2003 there were outbreaks of ethnic violence in the southern Niger delta region. This was serious because it was an important oil-producing centre; three foreign oil companies were forced to suspend operations, and Nigeria's total output of oil fell by 40 per cent.

In spite of all the problems, president Obasanjo won a convincing victory in the elections of April 2003, taking over 60 per cent of the votes; his People's Democratic Party won majorities in both houses of parliament. But things did not become any easier for him: in July the country was crippled by a general strike in protest against large increases in the price of petrol. Violence between Christians and Muslims now seemed a permanent feature of life in Nigeria; in February 2004 at least 150 people were killed in Plateau state in central Nigeria, after Muslims attacked a church and Christians took revenge. Statistics published by the UN showed that between 66 and 70 per cent of the population were living in poverty, compared with 48.5 per cent as recently as 1998. The same basic problem continues – the misuse of Nigeria's oil wealth. By 2004 the country had been exporting oil for more than 30 years, earning over $250 billion in revenue. However, ordinary people had seen very little benefit, while the ruling elites had amassed huge fortunes. In 2005 the president seemed to be making determined efforts to root out corruption. Several government ministers were sacked and even the vice-president, Atiku Abubakar, was accused of accepting bribes. During 2006 Nigerians were treated to the spectacle of their president and vice-president accusing each other of corruption and demanding the other's resignation. The constitution did not allow a president to run for more than two terms; however, the 2007 presidential election was won by Obasanjo's choice for the PDP party, the highly respected Umaru Yar'Adua.

Sadly, Yar'Adua was dogged by ill health and in November 2009 was flown to Saudi Arabia for medical treatment. Vice-President Goodluck Jonathan, a Christian, took over as acting president. Yar'Adua's death was announced in May 2010. Goodluck Jonathan was elected president in April 2011. His popularity soon plummeted when he announced the removal of a fuel subsidy, one of the few benefits that ordinary Nigerians enjoyed from their country's oil. The removal more than doubled the price of petrol from 45 cents a litre to 94 cents a litre, causing nationwide and violent protests culminating in a week-long strike. Eventually Jonathan bowed to pressure and announced that the price would be 60 cents a litre (January 2012). The unions called off the strikes but many people still believed that the price was too high. Meanwhile there was violence in the north where a radical Islamist group, Boko Haram, which wanted a separate Islamic state in the north, was blamed for a series of shootings and bombings killing around 500 people in the first of half of 2012. President Jonathan and his PDP supporters announced that they were determined to preserve the unity of Nigeria and to restore peace and security; but towards the end of the year there were reports that the government was on the verge of losing control of the north.

25.4 POVERTY IN TANZANIA

Tanganyika became independent in 1961 and was joined in 1964 by the island of Zanzibar to form Tanzania. It was ruled by Dr Julius Nyerere, leader of the Tanzanian African Nationalist Union (TANU), who had to deal with formidable problems:

- Tanzania was one of the poorest states in the whole of Africa.
- There was very little industry, few mineral resources and a heavy dependence on coffee production.

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- Later, Tanzania became involved in expensive military operations to overthrow President Idi Amin of Uganda, and provided help and training for nationalist guerrillas from countries like Zimbabwe.
- On the other hand, tribal problems were not as serious as elsewhere, and the Swahili language provided a common bond.

Nyerere retired as president in 1985 (aged 63), though he remained chairman of the party until 1990. He was succeeded as president by Ali Hassan Mwinyi, who had been vice-president, and who ruled for the next ten years.

(a) Nyerere's approach and achievements

His approach was different from that of any other African ruler. He began conventionally enough by expanding the economy: during the first ten years of independence, production of coffee and cotton doubled and sugar production trebled, while health services and education expanded. But Nyerere was not happy that Tanzania seemed to be developing along the same lines as Kenya, with an ever-widening gulf between the wealthy elite and the resentful masses. His proposed solution to the problem was set out in a remarkable document known as *the Arusha Declaration*, published in 1967. The country was to be run on socialist lines.

- All human beings should be treated as equal.
- The state must have effective control over the means of production and must intervene in economic life to make sure that people were not exploited, and that poverty and disease were eliminated.
- There must be no great accumulations of wealth, or society would no longer be classless.
- Bribery and corruption must be eliminated.
- According to Nyerere, Tanzania was at war, and the enemy was poverty and oppression. The way to victory was not through money and foreign aid, but through hard work and self-reliance. The first priority was to improve agriculture so that the country could be self-sufficient in food production.

Nyerere strove hard to put these aims into practice: all important enterprises, including those owned by foreigners, were nationalized; five-year development plans were introduced. Village projects were encouraged and given aid by the government; these involved *ujamaa* ('familyhood', or self-help): families in each village pooled resources and farmed in co-operatives; these were small but viable units which operated collectively and could use more modern techniques. Foreign loans and investments as well as imports were reduced to a minimum to avoid running into debt. Politically, Nyerere's brand of socialism meant a one-party state run by TANU, but elections were still held. It seemed that some elements of genuine democracy existed, since voters in each constituency had a choice of two TANU candidates and every election resulted in a large proportion of MPs losing their seats. Nyerere himself provided dignified leadership, and with his simple lifestyle and complete indifference to wealth, he set the perfect example for the party and the country to follow. It was a fascinating experiment which tried to combine socialist direction from the centre with the African traditions of local decision-making. It tried to provide an alternative to western capitalist society with its pursuit of profit, which most other African states seemed to be copying.

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(b) Success or failure?

Despite Nyerere's achievements, it was clear when he retired in 1985 that his experiment had been, at best, only a limited success. At an international conference on the Arusha Declaration (held December 1986), President Mwinyi gave some impressive social statistics which few other African countries could match: 3.7 million children in primary school; two universities with, in total, over 4500 students; a literacy rate of 85 per cent; 150 hospitals and 2600 dispensaries; infant mortality down to 137 per thousand; life expectancy up to 52.

However, other parts of the Arusha Declaration were not achieved. Corruption crept in because many officials were not as high-minded as Nyerere himself. There was insufficient investment in agriculture so that production was far below what was expected. The nationalization of the sisal estates carried out in the 1960s was a failure – Nyerere himself admitted that production had declined from 220 000 tonnes in 1970 to only 47 000 tonnes in 1984, and in May 1985 he reversed the nationalization. From the end of 1978, Tanzania was in difficulties because of the fall in world prices of coffee and tea (her main exports), rising oil prices (which used up almost half her earnings from exports) and the expense of the war against Amin in Uganda (at least £1000 million). Although oil prices began to fall during 1981, there was soon the problem of the near-collapse of her other exports (cattle, cement and agricultural produce), which left her without foreign exchange. Loans from the IMF only brought her the added problem of how to meet the interest repayments. Tanzania was nowhere near being a socialist state, nor was it self-sufficient – two major aims of the Declaration. Nyerere's socialist experiment might have worked well in a closed economy, but unfortunately Tanzania was becoming part of the 'global village', exposed to the vagaries of the world economy.

Nevertheless Nyerere was deservedly highly respected both as an African and as a world statesman, as an enemy of apartheid in South Africa, and as an outspoken critic of the world economy and the way it exploited poor countries. He played a vital role in the overthrow of Idi Amin, the brutal dictator who ruled Uganda from 1971 until 1979. Nyerere's prestige was at its height when he was chosen as chairman of the Organization of African Unity (OAU) for 1984–5.

(c) Tanzania after Nyerere

Nyerere's successor, President Mwinyi, while at first keeping to the one-party system, began to move away from strict government control, allowing more private enterprise and a mixed economy; he also accepted financial help from the IMF, which Nyerere had always avoided. Mwinyi was re-elected for a further five-year term in 1990; in 1992 a new constitution was introduced, allowing a multi-party system. The first major democratic elections were held in October 1995. Mwinyi was obliged to stand down after two terms as president. The ruling party, which now called itself Chama Cha Mapinduzi (CCM – the Party of the Revolution), put forward Benjamin Mkapa as its presidential candidate. He won a clear victory, with 60 per cent of the votes, and the CCM won 214 out of the 269 seats in parliament.

Tanzania's economy continued to be fragile and dependent on foreign aid. But foreign aid often came with unpleasant strings attached. In April 2000, for example, the IMF announced a debt-relief package for Tanzania, but one of the conditions was that parents had to contribute part of the fees for their children's education. This was totally unrealistic for a poor country like Tanzania and consequently the numbers of children in primary schools fell sharply. Nor was the situation helped by the spread of the HIV/AIDS virus, which infected over a million people. Care and prevention became major public health

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problems. At the same time, there were some promising developments. In 1999 Tanzania's first commercial gold mine went into production, and in 2000 preparations began for the mining of tanzanite, a precious stone even rarer than diamonds. As the elections of October 2000 approached, the government was troubled by a series of corruption scandals involving some of its wealthiest members, and also by nationalist sentiment in Zanzibar, which wanted more freedom from the mainland. However, the opposition parties were disorganized and seemed to have nothing better to offer; the president and his CCM won a sweeping victory – Mkapa took over 70 per cent of the votes and CCM won about 90 per cent of the seats in parliament. Foreign observers declared the elections to be free and fair, except in Zanzibar, where there were always complaints of rigging.

As Tanzania moved further into the twenty-first century, the economy began to fulfil some of its promise. President Mkapa privatized a number of state-owned corporations and introduced free-market policies, hoping that this would attract foreign investment and help towards economic expansion. The IMF and World Bank were so impressed by this that they obligingly agreed to cancel some of Tanzania's foreign debts. By the time Mkapa stepped down at the end of his second term in 2005, Tanzania was well on the way to becoming the world's third largest gold producer, and both foreign investment and tourism were increasing. However, although he had promised to put an end to corruption, he himself was accused of having, during the privatizations, illegally appropriated to himself, a coal mine. He was also criticized for spending £15 million on a private presidential jet. In the 2005 election the CCM candidate, Jakaya Kikwete, a protégé of Julius Nyerere, was elected president. He vowed to eliminate corruption and invested in the building of around 1500 new schools around the country and a new university at Dodoma, the capital. The USA gave a grant of some $700 million to help Tanzania's general development, and the UK promised £500 million towards education.

25.5 THE CONGO/ZAIRE

(a) Why and how did civil war develop?

Section 24.6(b) explained how the Belgians suddenly allowed the Congo to become independent in June 1960, with completely inadequate preparations. There was no experienced group of Africans to which power could be handed over. The Congolese had not been educated for professional jobs, very few had received any higher education and no political parties had been allowed. This did not mean that civil war was inevitable, but there were added complications.

1 There were about 150 different tribes (or ethnic groups, as they now tend to be called), which would have made the Congo difficult to hold together even with experienced administrators. Violent and chaotic elections were held in which the Congolese National Movement (MNC), led by a former post-office clerk, Patrice Lumumba, emerged as the dominant party; but there were over 50 different groups. Agreement of any sort was going to be difficult; nevertheless the Belgians handed power over to a coalition government with Lumumba as prime minister, and Joseph Kasavubu, the leader of another group, as president.
2 A mutiny broke out in the Congolese army (July 1960) only a few days after independence. This was in protest against the fact that all officers were Belgians, whereas the Africans expected instant promotion. Lumumba was deprived of the means of keeping law and order, and tribal violence began to spread.
3 The south-eastern province of Katanga, which had rich copper deposits, was encouraged by the Belgian company (Union Minière) which still controlled the

copper-mining industry, to declare itself independent under Moïse Tshombe. This was the wealthiest part of the Congo, which the new state could not afford to lose. Lumumba, unable to rely on his mutinous army, appealed to the UN to help him preserve Congolese unity, and a 3000-strong peacekeeping force soon arrived.

(b) The civil war and the role of the UN

Lumumba wanted to use UN troops to force Katanga back into the Congo, but the situation was complex. The president had already made himself unpopular with the Americans and British because of his outspoken socialism; the Americans in particular regarded him as a dangerous communist who would align the Congo on the side of the USSR in the Cold War. Many Belgians preferred an independent Katanga, which would be easier for them to influence, and they wanted to continue their control of the copper mining. Faced with all these pressures, the UN secretary-general, Dag Hammarskjöld, refused to allow a UN attack on Katanga, though at the same time he refused to recognize Katangese independence. In disgust Lumumba appealed for help to the Russians, but this horrified Kasavubu, who, supported by General Joseph Mobutu and encouraged by the Americans and Belgians, had Lumumba arrested; he and two former ministers in his government were later badly beaten and then murdered by Belgian troops. As the chaos continued, Hammarskjöld realized that more decisive UN action was needed, and although he was killed in an air crash while flying to Katanga to see Tshombe, his successor, U Thant, followed the same line. By mid-1961 there were 20 000 UN troops in the Congo; in September they invaded Katanga and in December 1962 the province admitted failure and ended its secession; Tshombe went into exile.

Though successful, UN operations had been expensive, and within a few months all their troops were withdrawn. Tribal rivalries aggravated by unemployment caused disorders to break out again almost immediately, and calm was not restored until 1965 when General Mobutu of the Congolese army, using white mercenaries and backed by the USA and Belgium, crushed all resistance and took over the government himself.

(c) General Mobutu in power

It was probably inevitable that if the Congo, with its many problems (an under-developed economy, tribal divisions and a shortage of educated people), was to stay united, a strong authoritarian government was required. Mobutu provided exactly that! There was a gradual improvement in conditions as the Congolese gained experience of administration, and the economy began to look healthier after most of the European-owned mines were nationalized.

However, in the late 1970s there were more troubles. In 1977 Katanga (now known as Shaba) was invaded by troops from Angola, apparently encouraged by the Angolan government, which resented Mobutu's earlier intervention in its affairs (see Section 24.6(d)), and by the USSR, which resented American support for Mobutu. This was a way for the USSR to make a gesture against the Americans, and yet another extension of the Cold War.

Having survived that problem, Zaire (as the country had been called since 1971) found itself in economic difficulties, mainly because of declining world copper prices, and drought which made expensive food imports necessary. Mobutu came under increasing criticism outside Zaire for his authoritarian style of government and his huge personal fortune. In May 1980 Amnesty International claimed that at least a thousand political prisoners were being held without trial and that several hundred had died from torture or starvation during

1978–9. An important new measure, the Nationality Law, was introduced in 1981. This restricted citizenship in Zaire to people who could demonstrate a family connection with the Congo at the time of the Berlin Conference of 1885. It aimed to deal with the problem dating back to the colonial era, when tens of thousands of migrant workers had moved into the Congo from neighbouring territories. The problem was exacerbated later by an influx of refugees from Uganda, Rwanda and Burundi. There was tension between the indigenous population and the immigrants, and the Nationality Law was passed in response to pressure from the indigenous Congolese. However, it was difficult to implement, and conflict between the two continued. In 1990 Mobutu allowed a multi-party system, but with himself above politics as head of state. He remained in power, but in 1995, after 30 years of his rule, he was becoming more and more unpopular with his people.

(d) The Kabilas, and civil war again

In the mid-1990s opposition to Mobutu increased. In the east of Zaire, Laurent Kabila, who had been a supporter of Patrice Lumumba, organized forces and began to move towards Kinshasa, the capital. In May 1997 Mobutu left the country and died later in the year in exile in Morocco. Laurent Kabila became president and changed the country's name from Zaire to the Democratic Republic of the Congo (DRC). If the Congolese people had expected dramatic changes in the system of government, they were soon disappointed. Kabila continued many of Mobutu's techniques – opposition politicians and journalists were arrested, political parties were banned, and elections cancelled. Some of his own supporters began to turn against him; the Banyamulenge, a people of Tutsi origin, many of whom had fought in Kabila's army, resented what they saw as his favouritism towards members of his own Luba tribe. They began a rebellion in the east (August 1998) and received support from the governments of neighbouring Uganda and Rwanda. The governments of Zimbabwe, Angola and Namibia pledged support for Kabila. With forces from six countries involved, the conflict soon developed a wider significance than just a civil war. In spite of attempts at negotiation, hostilities dragged on into the next century. Then in January 2001 Kabila was assassinated by a member of his bodyguard, who was immediately himself shot dead. His motive was unclear, though the murder was blamed on the rebels.

The ruling group quickly declared Kabila's son Joseph, the head of the Congolese military, as the next president. Joseph Kabila seemed more conciliatory than his father, promising free and fair elections and announcing that he was willing to make peace with the rebels. It was reported that since the civil war began, almost 3 million people had lost their lives, most of them from starvation and disease in the rebel area in the east. Encouraging signs soon developed:

- Restrictions on political parties were lifted (May 2001).
- The UN agreed that its peace mission should stay on in the DRC; it also welcomed the withdrawal of Namibian troops and called for other states with forces still in the DRC to withdraw them.
- Peace agreements were signed between the DRC, Rwanda and Uganda (2002), with South Africa and the UN acting as guarantors. Both sides were to withdraw troops from the eastern area of the country; a system of power-sharing was to be introduced in which Kabila remained president, with four vice-presidents chosen from the various rebel groups. The transitional power-sharing government would work towards elections in 2005.

The new transitional government was formed in July 2003; the future looked more promising than for many years, though sporadic ethnic violence continued. Especially troubled

was the north-eastern province of Ituri, where there were clashes between the Hema and Lendu tribes. A major step forward was achieved in 2005 when citizenship was awarded to everybody descended from ethnic groups present in the country at the time of independence in 1960. In July 2006 elections were held for president and for the national and provincial assemblies. Joseph Kabila took 44 per cent of the vote and did particularly well in the eastern Congo. His party won 111 out of 500 seats in the national assembly. Kabila's nearest rival, Jean-Pierre Bemba Gombo, a former rebel leader, won 20 per cent of the vote and did well in western Congo. Kabila had failed to win a large enough majority and a second round of voting was held in October. In the meantime violence broke out between armies of rival supporters, but the election itself went off reasonably peacefully and was declared to have been fairly conducted. This time Kabila won decisively, taking 58 per cent of the votes and was able to form a coalition government. However, Bemba refused to accept the result, and in March 2007 he tried to seize power in Kinshasa. After fierce fighting Bemba's forces were defeated and he took refuge in the South African embassy. He was allowed to fly to Portugal but was later arrested and taken to the Netherlands where, in July 2008 an International Criminal Court charged him with war crimes.

Joseph Kabila was elected for a second term as president in December 2011, but the election was widely condemned and described as 'lacking credibility'. It was reported that the votes from almost 2000 polling stations in areas where support for the opposition candidate, Etienne Tshisekede, was strong, had been 'lost'. The election was also condemned by the 35 Roman Catholic bishops in the DRC as being full of 'treachery, lies and terror'. They called for the electoral commission to put right 'serious errors'. The Archbishop of Kinshasa even called for a campaign of civil disobedience until the election result was annulled (January 2012). Nevertheless, Kabila stayed in power and the violence continued through 2012 as various rebel groups, with help from Rwanda, tried to overthrow him. In September 2012 President Kagame of Rwanda insisted that Rwanda's intervention was to protect Rwanda business interests in the DRC and to preserve Rwanda's security.

25.6 ANGOLA: A COLD WAR TRAGEDY

(a) Civil war escalates

Section 24.6(d) described how Angola was engulfed by civil war immediately after gaining independence from Portugal in 1975. Part of the problem was that there were three different liberation movements, which started to fight each other almost as soon as independence was declared.

- The **MPLA** (People's Movement for the Liberation of Angola) was a Marxist-style party which tried to appeal across tribal divisions to all Angolans. It was the MPLA which claimed to be the new government, with its leader, Agostinho Neto, as president.
- **UNITA** (National Union for the Total Independence of Angola), with its leader Jonas Savimbi, drew much of its support from the Ovimbundu tribe in the south of the country.
- **FNLA** (National Front for the Liberation of Angola); much weaker than the other two, it drew much of its support from the Bakongo tribe in the north-west.

Alarm bells immediately rang in the USA, which did not like the look of the Marxist MPLA. The Americans therefore decided to back the FNLA (which was also supported by President Mobutu of Zaire), providing advisers, cash and armaments, and encouraged it to

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attack the MPLA. UNITA also launched an offensive against the MPLA. Cuba sent troops to help the MPLA, while South African troops, supporting the other two groups, invaded Angola via neighbouring Namibia in the south. General Mobutu also sent troops in from Zaire to the north-east of Angola. No doubt there would have been fighting and bloodshed anyway, but outside interference and the extension of the Cold War to Angola certainly made the conflict much worse.

(b) Angola and Namibia

The problem of Namibia also complicated the situation. Lying between Angola and South Africa, Namibia (formerly German South West Africa) had been handed to South Africa in 1919 at the end of the First World War, to be prepared for independence. The white South African government had ignored UN orders and delayed handing Namibia over to black majority rule as long as possible. The Namibian liberation movement, SWAPO (South West Africa People's Organization), and its leader, Sam Nujoma, began a guerrilla campaign against South Africa. After 1975 the MPLA allowed SWAPO to have bases in southern Angola, so it was not surprising that the South African government was so hostile to the MPLA.

(c) The Lisbon Peace Accords (May 1991)

The civil war dragged on right through the 1980s until changing international circumstances brought the possibility of peace. In December 1988 the UN managed to arrange a peace settlement, in which South Africa agreed to withdraw from Namibia provided that the 50 000 Cuban troops left Angola. This agreement went ahead: Namibia became independent under the leadership of Sam Nujoma (1990). The end of the Cold War and of communist rule in eastern Europe meant that all communist support for the MPLA ceased, all Cuban troops had gone home by June 1991, and South Africa was ready to end her involvement. The UN, the Organization of African Unity (OAU), the USA and Russia all played a part in setting up peace talks between the MPLA government of Angola and UNITA in Lisbon (the capital of Portugal). It was agreed that there should be a ceasefire followed by elections, to be monitored by the UN.

(d) The failure of the peace

At first all seemed to go well: the ceasefire held and elections took place in September 1992. The MPLA won 58 per cent (129) of the seats in parliament, UNITA only 31 per cent (70 seats). Although the presidential election result was much closer – MPLA president Jose Eduardo Dos Santos won 49.57 per cent of the votes, with Jonas Savimbi (UNITA) taking 40.07 per cent – it was still a clear and decisive victory for the MPLA.

However, Savimbi and UNITA refused to accept the result, claiming that there had been fraud, even though the elections had been monitored by 400 UN observers; the leader of the UN team reported that the election had been 'generally free and fair'. Tragically UNITA, instead of accepting defeat gracefully, renewed the civil war, which was fought with increasing bitterness. By the end of January 1994 the UN reported that there were 3.3 million refugees and that an average of a thousand people a day, mainly civilians, were dying. The UN had too few personnel in Angola to bring the fighting to an end. This time the outside world could not be blamed for the civil war: this was clearly the fault of UNITA. However, many observers blamed the USA for encouraging UNITA:

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shortly before the Lisbon agreement, President Reagan had officially met Savimbi in the USA, which made him seem like an equal with the MPLA government instead of a rebel leader. At the same time the USA had not officially recognized the MPLA as the legal government of Angola, even after the elections; it was not until May 1993, six months after UNITA had resumed the war, that the USA finally gave recognition to the MPLA government.

A ceasefire was eventually negotiated in October 1994 and a peace agreement was reached in November. UNITA, which was losing the war by that time, accepted the 1992 election result, and in return was to be allowed to play a part in what would be, in effect, a coalition government. Early in 1995, 7000 UN troops arrived to help enforce the agreement and supervise the transition to peace. But incredibly, Savimbi soon began to break the terms of the agreement; financing his forces with the proceeds from illicit sales of diamonds, he continued the struggle against the government until February 2002, when he was killed in an ambush by government troops. His death changed the situation dramatically Almost immediately the new leaders of UNITA showed a willingness to negotiate. In April 2002 a ceasefire was signed, and the two sides promised to keep the terms of the 1994 agreement. The Angolan National Assembly voted in favour of extending an amnesty to all UNITA members, including fighters and civilians. The whole agreement was to be monitored by the UN. At last, with Savimbi no longer on the scene, there seemed to be a genuine chance for peace and reconstruction in Angola.

During the 27 years of its existence, Angola had not known real peace, and its development had been severely hampered. It was a potentially prosperous country, rich in oil, diamonds and minerals; the central highlands were fertile – ideal for rearing cattle and raising crops; coffee was a major product. But at the end of the twentieth century the economy was in a mess: inflation was running at 240 per cent, the war was ruinously expensive, and the vast majority of the population was living in poverty, and thousands were on the verge of starvation. Leading politicians faced accusations of corruption on a grand scale. According to the IMF over $4 billion of oil receipts had disappeared from the treasury since 1996. Human Rights Watch reported that UNITA had employed 86 000 child soldiers, and even the government forces had used 3000. The two armies between them had laid some 15 million landmines and many of these still had to be destroyed. It was calculated that about 4 million people (a third of the population) had been forced to leave their homes and were left homeless in 2002, while 1.5 million had been killed.

Angola's natural resources enabled the country to recover reasonably quickly economically. An encouraging sign was the signing of a peace deal with the separatist rebels of the Cabinda region. It was a relatively small area with a population of little more than 100 000, but it was important because about 65 per cent of Angola's oil comes from there. In September 2008 the first national elections for 16 years took place. The ruling MPLA won just over 80 per cent of the votes, while the main opposition party (UNITA) could muster only 10 per cent, giving the MPLA and president José Eduardo dos Santos a two-thirds majority in parliament. By 2010 the president's popularity was beginning to wane. One of the main criticisms was that he and his family had amassed huge personal fortunes while the country's recovery and wealth had not percolated down to ordinary people. He survived an assassination attempt in October 2010, and there was an increasing number of massive anti-government demonstrations. By September 2011 the police were using violent methods to disperse demonstrators. However, President dos Santos, now aged 70, appeared to be the comfortable winner in the election of August 2012, and thanks to a change in the constitution, he seemed set to stay in power until 2022.

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25.7 GENOCIDE IN BURUNDI AND RWANDA

The Belgians left these two small states, like the Congo, completely unprepared for independence. In both states there was an explosive mixture of two tribes – the Tutsi and the Hutu. They spoke the same language and looked very much alike, and although the Hutu were in a majority, the Tutsi were the elite ruling group, and they followed different occupations: the Tutsi raised cattle (the word 'Tutsi' actually means 'rich in cattle'), whereas the Hutu were mainly farmers growing bananas and other crops (the word 'Hutu' means 'servant)'. There was continuous tension and skirmishing between the two tribes right from independence day in 1962.

(a) Burundi

There was a mass rising of Hutus against the ruling Tutsi in 1972; this was savagely put down, and over 100 000 Hutu were killed, along with many Tutsi. Some 200 000 Tutsi fled into Tanzania. In 1988 Hutu soldiers in the Burundi army massacred thousands of Tutsi. In 1993 the country held its first democratic elections and for the first time a Hutu president was chosen. Tutsi soldiers soon murdered the new president, in October 1993, but other members of the Hutu government were able to escape. As Hutu carried out reprisal killings against Tutsi, massacre followed massacre; around 50 000 Tutsi were killed and the country disintegrated into chaos. Eventually the army imposed a power-sharing agreement: the prime minister was to be a Tutsi, the president a Hutu, but most of the power was concentrated in the hands of the Tutsi prime minister.

Fighting continued into 1996, and the Organization of African Unity, which sent a peacekeeping force (the first time it had ever taken such action), was unable to prevent the continuing massacres and ethnic cleansing. The economy was in ruins, agricultural production was seriously reduced because much of the rural population had fled, and the government seemed to have no ideas about how to end the war. The outside world and the great powers showed little concern – their interests were not involved or threatened – and the conflict in Burundi was not given much coverage in the world's media. In July 1996, the army overthrew the divided government, and Major Pierre Buyoya (a Tutsi moderate) declared himself president. He claimed that this was not a normal coup – the army had seized power in order to save lives. He had the utmost difficulty in pacifying the country; several former African presidents, including Julius Nyerere of Tanzania and Nelson Mandela of South Africa, attempted to mediate. The problem was that there were about 20 different warring groups, and it was difficult to get representatives of them all together at the same time. In October 2001 an agreement was reached at Arusha (Tanzania), with the help of Mandela. There was to be a three-year transitional period; during the first half of this, Buyoya would continue as president with a Hutu vice-president; after this, a Hutu would become president with a Tutsi vice-president. There was to be an international peacekeeping force and restrictions were to be lifted on political activity. However, not all the rebel groups had signed the Arusha agreement, and fighting continued, in spite of the arrival of South African peacekeepers.

Prospects for peace brightened in December 2002 when the main Hutu rebel party at last signed a ceasefire with the government. President Buyoya kept his side of the Arusha agreement, handing over the presidency to Domitien Ndayizeye, a Hutu (April 2003). The new president was soon able to reach a power-sharing agreement with the remaining Hutu rebel group, but the peace remained fragile. Elections for parliament in 2005 resulted in a series of victories for the ruling party, and its leader, Pierre Nkurunziza, was chosen as the next president. One of the younger generation of Hutu leaders, he described himself as a

born-again Christian and was committed to restoring peace and harmony among all Burundians. He also aimed to revive the economy and develop social policy. His first achievement was to reach a ceasefire with the last of the rebel militias (2006). New policies were introduced to safeguard the rights of women and children and to provide free education for primary-school children. He was also keen to keep in touch with ordinary people, and spent a lot of time in the countryside, meeting and talking with villagers. He received several international honours including a UN peace award, and in August 2009 he was presented with the 'Model Leader for a New Africa Award' by the African Forum on Religion and Government, the first African president to be so honoured. In August 2010 President Nkurunziza was elected for a second five-year term.

(b) Rwanda

Tribal warfare began in 1959 before independence, and reached its first big climax in 1963, when the Hutu, fearing a Tutsi invasion from Burundi, massacred thousands of Rwandan Tutsi and overthrew the Tutsi government. In 1990 fighting broke out between the rebel Tutsi-dominated Rwandese Patriotic Front (Front Patriotique Rwandais – FPR), which was based over the border in Uganda, and the official Rwandan army (Hutu-dominated). This lasted off and on until 1993 when the UN helped to negotiate a peace settlement at Arusha in Tanzania, between the Rwandan government (Hutu) and the FPR (Tutsi): there was to be a more broadly-based government, which would include the FPR; 2500 UN troops were sent to monitor the transition to peace (October 1993).

For a few months all seemed to be going well, and then disaster struck. The more extreme Hutu were bitterly opposed to the Arusha peace plan, and shocked by the murder of the Hutu president of Burundi. Extremist Hutu, who had formed their own militia (the Interahamwe), decided to act. The aircraft bringing the moderate Hutu President Habyarimana of Rwanda and the Burundian president back from talks in Tanzania was brought down by a missile, apparently fired by extremist Hutu as it approached Kigali (the capital of Rwanda), killing both presidents (April 1994). With the president dead, nobody was sure who was giving the orders, and this gave the Interahamwe the cover they needed to launch a campaign of genocide. The most horrifying tribal slaughter followed; Hutu murdered all Tutsi they could lay hands on, including women and children. A favourite technique was to persuade Tutsi to take sanctuary in churches and then destroy the church buildings and the sheltering Tutsi. Even nuns and clergy were caught up in the massacre. Altogether about 800 000 Tutsi and moderate Hutu who tried to help their neighbours were brutally murdered in what was clearly a deliberate and carefully planned attempt to wipe out the entire Tutsi population of Rwanda, and it was backed by the Hutu government of Rwanda.

The Tutsi FPR responded by taking up the fight again and marching on the capital; UN observers reported that the streets of Kigali were literally running with blood and the corpses were piled high. The small UN force was not equipped to deal with violence on this scale, and it soon withdrew. The civil war and the genocide continued through into June; in addition to those killed, about a million Tutsi refugees had fled into neighbouring Tanzania and Zaire.

Meanwhile the rest of the world, though outraged and horrified by the scale of the genocide, did nothing to stop it. Historian Linda Melvern has shown how the warning signs of what was to come were ignored by all those who might have prevented the genocide. She claims that Belgium and France both knew what was being planned; as early as the spring of 1992, the Belgian ambassador told his government that extremist Hutus were 'planning the extermination of the Tutsi of Rwanda once and for all, and to crush the internal Hutu opposition'. The French continued to supply the Hutu with arms throughout the genocide;

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US president Clinton knew precisely what was happening, but after the humiliation of the US intervention in Somalia in 1992, he was determined not to get involved. Linda Melvern is highly critical of the UN; she points out that UN secretary-general Boutros-Ghali knew Rwanda well and was aware of the situation, but being pro-Hutu, refused to allow arms inspections and avoided sending sufficient UN forces to deal with the problem. On the other hand, it was not just the West and the UN that turned a blind eye to the tragedy in Rwanda; the Organization of African Unity did not even condemn the genocide, let alone try to prevent it; nor did any other African states take any action or issue public condemnation. Arguably African attention was focused on the new democracy in South Africa rather than on halting the genocide in Rwanda.

By September the FPR were beginning to get the upper hand: the Hutu government was driven out and a Tutsi FPR government was set up in Kigali. But progress to peace was slow; by the end of 1996 this new government was still beginning to make its authority felt over the whole country, and refugees started to return. Eventually a power-sharing arrangement was reached, and a moderate Hutu, Pasteur Bizimungu, became president with Paul Kagame, a Tutsi, as his vice-president. This was an important concession by the Tutsi as they tried to deflect accusations of a resurgent Tutsi elitism, though in fact Kagame was the real policy decider. However, in 2000 when Bizimungu began to criticize parts of Kagame's programme, he was removed from the presidency and Kagame took over. Bizimunbu immediately founded an opposition party but the Kagame government banned it.

One of the problems facing the government was that jails were overflowing with well over 100 000 prisoners awaiting trial for involvement in the 1994 genocide. There were simply too many for the courts to deal with. In January 2003, Kagame ordered the release of around 40 000 prisoners, though it was made clear that they would face trial eventually. This caused consternation among many survivors of the massacres, who were horrified at the prospect of coming face to face with the people who had murdered their relatives.

A new constitution was introduced in 2003 providing for a president and a two-chamber parliament and established a balance of political power between Hutu and Tutsi – no party can hold more than half the seats in parliament. It also outlawed the incitement of ethnic hatred in the hope of avoiding a repeat of the genocide. In the first national elections since 1994, President Kagame won an overwhelming victory, taking 95 per cent of the votes (August 2003). However, observers reported that there were 'malpractices' in some areas, and two of the main opposition parties were banned. But at least Rwanda seemed to be enjoying a period of relative calm. In February 2004, the government introduced a new reconciliation policy: people who admitted their guilt and asked for forgiveness before 15 March 2004 would be released (except those accused of organizing the genocide). It was hoped that this, like the South African Truth and Reconciliation Commission, would help Rwandans to come to terms with the traumas of the past and move forward into a period of peace and harmony.

Certainly economic and social conditions improved during Kagame's presidency. He succeeded in reducing the amount of corruption and crime; between 2000 and 2008 per capita income doubled; almost half the country's children were receiving a full primary education, compared with 20 per cent before Kagame came to power; and there was a marked increase in life expectancy. Rwandans infected with AIDS could now receive antiretroviral drugs in health centres across the country. Exports of tea and coffee began to increase, and tourism became an important source of revenue, especially the safari parks. In 2009 Rwanda was accepted as a member of the British Commonwealth of Nations; this was an attempt to distance the country from its Belgian past. President Kagame was decisively re-elected for a further term in August 2010, although doubts were expressed by observers about how free the elections really were. During the election campaign, several opposition supporters and journalists were killed and press freedom

was limited. The UN, the European Union and the USA all expressed concerns about these developments.

25.8 APARTHEID AND BLACK MAJORITY RULE IN SOUTH AFRICA

(a) The formation of the Union of South Africa

South Africa has had a complicated history. The first Europeans to settle there permanently were members of the Dutch East India Company who founded a colony at the Cape of Good Hope in 1652. It remained a Dutch colony until 1795, and during that time, the Dutch, who were known as Afrikaners or Boers (a word meaning 'farmers'), took land away from the native Africans and forced them to work as labourers, treating them as little better than slaves. They also brought more labourers in from Asia, Mozambique and Madagascar.

In 1795 the Cape was captured by the British during the French Revolutionary Wars, and the 1814 peace settlement decided that it should remain British. Many British settlers went out to Cape Colony. The Dutch settlers became restless under British rule, especially when the British government made all slaves free throughout the British Empire (1838). The Boer farmers felt that this threatened their livelihood, and many of them decided to leave Cape Colony. They moved northwards (in what became known as 'the Great Trek') and set up their own independent republics of the Transvaal and Orange Free State (1835–40). Some also moved into the area east of Cape Colony known as Natal. In the Boer War (1899–1902) the British defeated the Transvaal and the Orange Free State, and in 1910 they joined up with Cape Colony and Natal to form the Union of South Africa.

The population of the new state was mixed:

Approximately

70 per cent were black Africans, known as Bantus;
18 per cent were whites of European origin; of these about 60 per cent were Dutch, the rest British;
9 per cent were of mixed race, known as 'coloureds';
3 per cent were Asians.

Although they made up the vast majority of the population, black Africans suffered even worse discrimination than black people in the USA.

- The whites dominated politics and the economic life of the new state, and, with only a few exceptions, blacks were not allowed to vote.
- Black people had to do most of the manual work in factories, in the gold mines and on farms; the men mostly lived in barracks accommodation away from their wives and children. Black people generally were expected to live in areas reserved for them away from white residential areas. These reserved areas made up only about 7 per cent of the total area of South Africa and were not large enough to enable the Africans to produce sufficient food for themselves and to pay all their taxes. Black Africans were forbidden to buy land outside the reserves.
- The government controlled the movement of blacks by a system of pass laws. For example, a black person could not live in a town unless he had a pass showing that he was working in a white-owned business. An African could not leave the farm

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where he worked without a pass from his employer; nor could he get a new job unless his previous employer signed him out officially; many workers were forced to stay in difficult working conditions, even under abusive employers.
- Living and working conditions for blacks were primitive; for example, in the gold-mining industry, Africans had to live in single-sex compounds with sometimes as many as 90 men sharing a dormitory.
- By a law of 1911, black workers were forbidden to strike and were barred from holding skilled jobs.

(b) Dr Malan introduces apartheid

After the Second World War there were important changes in the way black Africans were treated. Under Prime Minister Malan (1948–54), a new policy called *apartheid (separateness)* was introduced. This tightened up control over blacks still further. Why was apartheid introduced?

- When India and Pakistan were given independence in 1947, white South Africans became alarmed at the growing racial equality within the Commonwealth, and they were determined to preserve their supremacy.
- Most of the whites, especially those of Dutch origin, were against racial equality, but the most extreme were the Afrikaner Nationalist Party led by Dr Malan. They claimed that whites were a master race, and that non-whites were inferior beings. The Dutch Reformed Church (the official state church of South Africa) supported this view and quoted passages from the Bible which, they claimed, proved their theory. This was very much out of line with the rest of the Christian churches, which believe in racial equality. The Broederbond was a secret Afrikaner organization which worked to protect and preserve Afrikaner power.
- The Nationalists won the 1948 elections with promises to rescue the whites from the 'black menace' and to preserve the racial purity of the whites. This would help to ensure continued white supremacy.

(c) Apartheid developed further

Apartheid was continued and developed further by the prime ministers who followed Malan: Strijdom (1954–8), Verwoerd (1958–66) and Vorster (1966–78).

The main features of apartheid

1 There was complete separation of blacks and whites as far as possible at all levels. In country areas blacks had to live in special reserves; in urban areas they had separate townships built at suitable distances from the white residential areas. If an existing black township was thought to be too close to a 'white' area, the whole community was uprooted and 're-grouped' somewhere else to make separation as complete as possible. There were separate buses, coaches, trains, cafés, toilets, park benches, hospitals, beaches, picnic areas, sports and even churches. Black children went to separate schools and were given a much inferior education. But there was a flaw in the system: complete separation was impossible because over half the non-white population worked in white-owned mines, factories and other businesses. The economy would have collapsed if all non-whites had been moved to reserves. In addition, virtually every white household had at least two African servants.

2 Every person was given a racial classification and an identity card. There were strict pass laws which meant that black Africans had to stay in their reserves or in their townships unless they were travelling to a white area to work, in which case they would be issued with passes. Otherwise all travelling was forbidden without police permission.
3 Marriage and sexual relations between whites and non-whites were forbidden; this was to preserve the purity of the white race. Police spied shamelessly on anybody suspected of breaking the rules.
4 The Bantu Self-Government Act (1959) set up seven regions called Bantustans, based on the original African reserves. It was claimed that they would eventually move towards self-government. In 1969 it was announced that the first Bantustan, the Transkei, had become 'independent'. However, the outside world dismissed this with contempt since the South African government continued to control the Transkei's economy and foreign affairs. The whole policy was criticized because the Bantustan areas covered only about 13 per cent of the country's total area; over 8 million black people were crammed into these relatively small areas, which were vastly overcrowded and unable to support the black populations adequately. They became very little better than rural slums, but the government ignored the protests and continued its policy; by 1980 two more African 'homelands', Bophuthatswana and Venda, had received 'independence'.
5 Africans lost all political rights, and their representation in parliament, which had been by white MPs, was abolished.

(d) Opposition to apartheid

1 *Inside South Africa*
Inside South Africa, opposition to the system was difficult. Anyone who objected – including whites – or broke the apartheid laws, was accused of being a communist and was severely punished under the Suppression of Communism Act. Africans were forbidden to strike, and their political party, the African National Congress (ANC), was helpless. In spite of this, protests did take place.

- Chief Albert Luthuli, the ANC leader, organized a protest campaign in which black Africans stopped work on certain days. In 1952 Africans attempted a systematic breach of the laws by entering shops and other places reserved for whites. Over 8000 blacks were arrested and many were flogged. Luthuli was deprived of his chieftaincy and put in jail for a time, and the campaign was called off.
- In 1955 the ANC formed a coalition with Asian and coloured groups, and at a massive open-air meeting at Kliptown (near Johannesburg), they just had time to announce a freedom charter before police broke up the crowd. The charter soon became the main ANC programme. It began by declaring: 'South Africa belongs to all who live in it, black and white, and no government can claim authority unless it is based on the will of the people.' It went on to demand:

    - equality before the law;
    - freedom of assembly, movement, speech, religion and the press;
    - the right to vote;
    - the right to work, with equal pay for equal work;
    - a 40-hour working week, a minimum wage and unemployment benefits;
    - free medical care;
    - free, compulsory and equal education.

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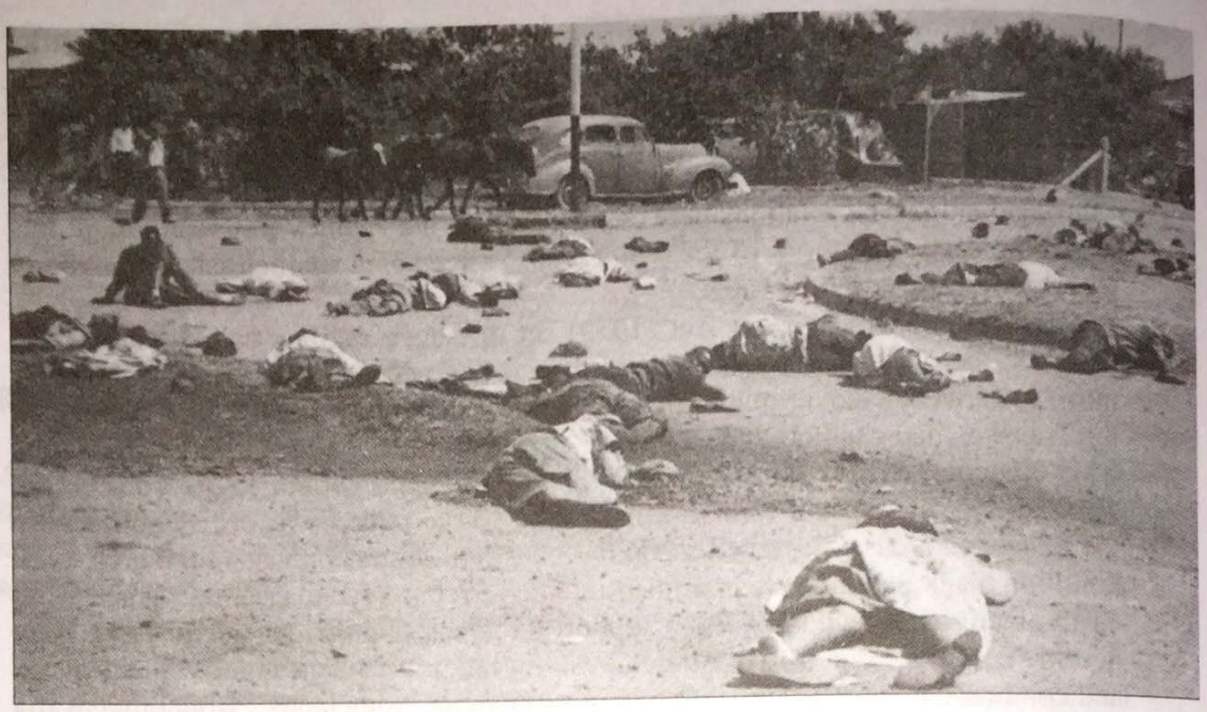

Illustration 25.1 **Bodies litter the ground after the Sharpeville massacre, South Africa, 1960**

- Church leaders and missionaries, both black and white, spoke out against apartheid. They included people like Trevor Huddleston, a British missionary who had been working in South Africa since 1943.
- Later the ANC organized other protests, including the 1957 bus boycott: instead of paying a fare increase on the bus route from their township to Johannesburg ten miles away, thousands of Africans walked to work and back for three months until fares were reduced.
- Protests reached a climax in 1960 when a huge demonstration took place against the pass laws at Sharpeville, an African township near Johannesburg. Police fired on the crowd, killing 67 Africans and wounding many more (see Illus. 25.1). After this, 15 000 Africans were arrested and hundreds of people were beaten by police. This was an important turning point in the campaign: until then most of the protests had been non-violent; but this brutal treatment by the authorities convinced many black leaders that violence could only be met with violence.
- A small action group of the ANC, known as *Umkhonto we Sizwe* (Spear of the Nation), or MK, was launched; Nelson Mandela was a prominent member. They organized a campaign of sabotaging strategic targets: in 1961 there was a spate of bomb attacks in Johannesburg, Port Elizabeth and Durban. But the police soon clamped down, arresting most of the black leaders, including Mandela, who was sentenced to life imprisonment on Robben Island. Chief Luthuli still persevered with non-violent protests, and after publishing his moving autobiography *Let My People Go*, he was awarded the Nobel Peace Prize. He was killed in 1967, the authorities claiming that he had deliberately stepped in front of a train.
- Discontent and protest increased again in the 1970s because the wages of Africans failed to keep pace with inflation. In 1976, when the Transvaal authorities announced that Afrikaans (the language spoken by whites of Dutch descent) was to be used in black African schools, massive demonstrations took place at Soweto, a black township near Johannesburg. Although there were many children and young people in the crowd, police opened fire, killing at least 200 black Africans. This

time the protests did not die down; they spread over the whole country. Again the government responded with brutality: over the next six months a further 500 Africans were killed; among the victims was Steve Biko, a young African leader who had been urging people to be proud of their blackness. He was beaten to death by police (1976).

2 *Outside South Africa*

Outside South Africa there was opposition to apartheid from the rest of the Commonwealth. Early in 1960 the British Conservative prime minister, Harold Macmillan, had the courage to speak out against it in Cape Town; he spoke about the growing strength of African nationalism: 'the wind of change is blowing through the continent ... our national policies must take account of it'. His warnings were ignored, and shortly afterwards, the world was horrified by the Sharpeville massacre. At the 1961 Commonwealth Conference, criticism of South Africa was intense, and many thought the country would be expelled. In the end Verwoerd withdrew South Africa's application for continued membership (in 1960 it had become a republic instead of a dominion, thereby severing the connection with the British crown; because of this the government had had to apply for readmission to the Commonwealth), and it ceased to be a member of the Commonwealth.

3 *The UN and OAU*

The United Nations and the Organization of African Unity condemned apartheid and were particularly critical of the continued South African occupation of South West Africa (see above, Section 25.6(b)). The UN voted to place an economic boycott on South Africa (1962), but this proved useless because not all member states supported it. Britain, the USA, France, West Germany and Italy condemned apartheid in public, but continued to trade with South Africa. Among other things, they sold South Africa massive arms supplies, apparently hoping that it would prove to be a bastion against the spread of communism in Africa. Consequently Verwoerd (until his assassination in 1966) and his successor Vorster (1966–78) were able to ignore the protests from the outside world until well into the 1970s.

(e) The end of apartheid

The system of apartheid continued without any concessions being made to black people, until 1980.

1 P. W. Botha

The new prime minister, P. W. Botha (elected 1979), realized that all was not well with the system. He decided that he must reform apartheid, dropping some of the most unpopular aspects in an attempt to preserve white control. What caused this change?

- Criticism from abroad (from the Commonwealth, the United Nations and the Organization of African Unity) gradually gathered momentum. External pressures became much greater in 1975 when the white-ruled Portuguese colonies of Angola and Mozambique achieved independence after a long struggle (see Section 24.6(d)). The African takeover of Zimbabwe (1980) removed the last of the white-ruled states which had been sympathetic to the South African government and apartheid. Now South Africa was surrounded by hostile black states, and many Africans in these new states had sworn never to rest until their fellow-Africans in South Africa had been liberated.

- There were economic problems – South Africa was hit by recession in the late 1970s, and many white people were worse off. Whites began to emigrate in large numbers, but the black population was increasing. In 1980 whites made up only 16 per cent of the population, whereas between the two world wars they had formed 21 per cent.
- The African homelands were a failure: they were poverty-stricken, their rulers were corrupt and no foreign government recognized them as genuinely independent states.
- The USA, which was treating its own black people better during the 1970s, began to criticize the South African government's racist policy.

In a speech in September 1979 which astonished many of his Nationalist supporters, the newly elected Prime Minister Botha said:

> A revolution in South Africa is no longer just a remote possibility. Either we adapt or we perish. White domination and legally enforced apartheid are a recipe for permanent conflict.

He went on to suggest that the black homelands must be made viable and that unnecessary discrimination must be abolished. Gradually he introduced some important changes which he hoped would be enough to silence the critics both inside and outside South Africa.

- Blacks were allowed to join trade unions and to go on strike (1979).
- Blacks were allowed to elect their own local township councils (but not to vote in national elections) (1981).
- A new constitution was introduced, setting up two new houses of parliament, one for coloureds and one for Asians (but not for Africans). The new system was weighted so that the whites kept overall control. It came into force in 1984.
- Sexual relations and marriage were allowed between people of different races (1985).
- The hated pass laws for non-whites were abolished (1986).

This was as far as Botha was prepared to go. He would not even consider the ANC's main demands (the right to vote and to play a full part in ruling the country). Far from being won over by these concessions, black Africans were incensed that the new constitution made no provision for them, and were determined to settle for nothing less than full political rights.

Violence escalated, with both sides guilty of excesses. The ANC used the 'necklace', a tyre placed round the victim's neck and set on fire, to murder black councillors and black police, who were regarded as collaborators with apartheid. On the 25th anniversary of Sharpeville, police opened fire on a procession of black mourners going to a funeral near Uitenhage (Port Elizabeth), killing over forty people (March 1985). In July a state of emergency was declared in the worst affected areas, and it was extended to the whole country in June 1986. This gave the police the power to arrest people without warrants, and freedom from all criminal proceedings; thousands of people were arrested, and newspapers, radio and TV were banned from reporting demonstrations and strikes.

However, as so often happens when an authoritarian regime tries to reform itself, it proved impossible to stop the process of change (the same happened in the USSR when Gorbachev tried to reform communism). By the late 1980s international pressure on South Africa was having more effect, and internal attitudes had changed.

- In August 1986 the Commonwealth (except Britain) agreed on a strong package of sanctions (no further loans, no sales of oil, computer equipment or nuclear goods to

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South Africa, and no cultural and scientific contacts). British prime minister Margaret Thatcher would commit Britain only to a voluntary ban on investment in South Africa. Her argument was that severe economic sanctions would worsen the plight of black Africans, who would be thrown out of their jobs. This caused the rest of the Commonwealth to feel bitter against Britain; Rajiv Gandhi, the Indian prime minister, accused Mrs Thatcher of 'compromising on basic principles and values for economic ends'.

- In September 1986 the USA joined the fray when Congress voted (over President Reagan's veto) to stop American loans to South Africa, to cut air links and to ban imports of iron, steel, coal, textiles and uranium from South Africa.
- The black population was no longer just a mass of uneducated and unskilled labourers; there was a steadily growing number of well-educated, professional, middle-class black people, some of them holding important positions, like Desmond Tutu, who was awarded the Nobel Peace Prize in 1984 and became Anglican archbishop of Cape Town in 1986.
- The Dutch Reformed Church, which had once supported apartheid, now condemned it as incompatible with Christianity. A majority of white South Africans now recognized that it was difficult to defend the total exclusion of blacks from the country's political life. So although they were nervous about what might happen, they became resigned to the idea of black majority rule at some time in the future. White moderates were therefore prepared to make the best of the situation and get the best deal possible.

2 F. W. de Klerk

The new president, F. W. de Klerk (elected 1989), had a reputation for caution, but privately he had decided that apartheid would have to go completely, and he accepted that black majority rule must come eventually. The problem was how to achieve it without further violence and possible civil war. With great courage and determination, and in the face of bitter opposition from right-wing Afrikaner groups, de Klerk gradually moved the country towards black majority rule.

- Nelson Mandela was released after 27 years in jail (1990) and became leader of the ANC, which was made legal.
- Most of the remaining apartheid laws were dropped.
- Namibia, the neighbouring territory ruled by South Africa since 1919, was given independence under a black government (1990).
- Talks began in 1991 between the government and the ANC to work out a new constitution which would allow blacks full political rights.

Meanwhile the ANC was doing its best to present itself as a moderate party which had no plans for wholesale nationalization, and to reassure whites that they would be safe and happy under black rule. Nelson Mandela condemned violence and called for reconciliation between blacks and whites. The negotiations were long and difficult; de Klerk had to face right-wing opposition from his own National Party and from various extreme, white racialist groups who claimed that he had betrayed them. The ANC was involved in a power struggle with another black party, the Natal-based Zulu Inkatha Freedom Party led by Chief Buthelezi.

3 Transition to black majority rule

In the spring of 1993 the talks were successful and a power-sharing scheme was worked out to carry through the transition to black majority rule. A general election was held and the ANC won almost two-thirds of the votes. As had been agreed, a coalition government

of the ANC, National Party and Inkatha took office, with Nelson Mandela as the first black president of South Africa, two vice-presidents, one black and one white (Thabo Mbeki and F. W. de Klerk), and Chief Buthelezi as Home Affairs Minister (May 1994). A right-wing Afrikaner group, led by Eugene Terreblanche, continued to oppose the new democracy, vowing to provoke civil war, but in the end it came to nothing. Although there had been violence and bloodshed, it was a remarkable achievement, for which both de Klerk and Mandela deserve the credit, that South Africa was able to move from apartheid to black majority rule without civil war.

(f) Mandela and Mbeki

The government faced daunting problems and was expected to deliver on the promises in the ANC programme, especially to improve conditions for the black population. Plans were put into operation to raise their general standard of living – in education, housing, health care, water and power supplies and sanitation. But the scale of the problem was so vast that it would be many years before standards would show improvement for everybody. In May 1996 a new constitution was agreed, to come into operation after the elections of 1999, which would not allow minority parties to take part in the government. When this was revealed (May 1996), the Nationalists immediately announced that they would withdraw from the government to a 'dynamic but responsible opposition'. As the country moved towards the millennium, the main problems facing the president were how to maintain sound financial and economic policies, and how to attract foreign aid and investment; potential investors were hesitant, awaiting future developments.

One of Mandela's most successful initiatives was the Truth and Reconciliation Commission, which looked into human rights abuses during the apartheid regime. Assisted by Archbishop Desmond Tutu, the commission's approach was not one of taking revenge, but of granting amnesties; people were encouraged to talk frankly, and to acknowledge their crimes and ask for forgiveness. This was one of the most admirable things about Mandela, that although he had been kept in prison under the apartheid regime for 27 years, he still believed in forgiveness and reconciliation. The president decided not to stand for re-election in 1999 – he was almost 81 years old; he retired with his reputation high, almost universally admired for his statesmanship and restraint.

Thabo Mbeki, who became ANC leader and president on Mandela's retirement, had a difficult job to follow such a charismatic leader. After winning the 1999 elections, Mbeki and the ANC had to deal with mounting problems: the crime rate soared, trade unions called strikes in protest against job losses, poor working conditions and the increasing rate of privatization. The economic growth rate was slowing down: in 2001 it was only 1.5 per cent compared with 3.1 in 2000. The government came under special criticism for its handling of the AIDS epidemic. Mbeki was slow to recognize that there really was a crisis and claimed that AIDS was not necessarily linked to HIV; he refused to declare a state of emergency, as opposition parties and trade unions demanded. This would have enabled South Africa to obtain cheaper medicines, but the government seemed unwilling to spend large amounts of cash on the necessary drugs. There was uproar in October 2001 when a report claimed that AIDS was now the main cause of death in South Africa, and that if the trend continued, at least 5 million people would have died from it by 2010.

As the 2004 elections approached, there were many positive signs in the new South Africa. Government policies were beginning to show results: 70 per cent of black households had electricity, the number of people with access to pure water had increased by 9 million since 1994, and about 2000 new houses for poor people had been built. Education was free and compulsory and many black people said that they felt they now had dignity, instead of being treated like animals, as they had been under apartheid. The economic

situation appeared brighter: South Africa was diversifying its exports instead of relying on gold and there was a growing tourist industry; the budget deficit had fallen sharply and inflation was down to 4 per cent. The main problems were still AIDS – it was reported that in 2005 South Africa was the country with the most HIV positive people in the world, 6.5 million; high unemployment levels and the high crime rate. However, in the election of April 2004, Mbeki was re-elected for a second and final five-year term as president and his ANC won a landslide victory, taking around two-thirds of the votes cast.

During Mbeki's second term it was the problems rather than the progress that gained most of the publicity. There was an influx of migrants and refugees, mainly from Zimbabwe, but also from Rwanda, the Congo, Somalia and Ethiopia. With unemployment already high and housing in short supply, this has caused competition for jobs and living accommodation, especially in the shanty towns that surround most large cities. In May 2008 there were serious protest riots directed against immigrants, and at least 80 people were killed. The more left-wing ANC supporters felt that there had been too little progress in the redistribution of wealth. In May 2009 South Africa's unemployment rate had reached 25 per cent and those out of work were forced to live on less than US$1.25 a day. Mbeki's second term was also marred by a feud with his vice-president Jacob Zuma. In 2005 Mbeke sacked him after Zuma was accused of corruption, including fraud and money-laundering. In December 2007 Zuma, still a very popular figure, defeated Mbeke in the election for president of the ANC. When Zuma was acquitted on the corruption charges, the ANC National Executive Committee voted that Mbeke was no longer fit to lead the country, the implication being that the charges against Zuma had been trumped up in order to get him removed. Mbeke immediately resigned and in May 2009 Zuma was elected president. He was firmly on the left-wing of the ANC and had once been a member of the South African Communist Party. Now he could rely on solid support from the trade unions and the communists. His programme included a pledge to fight poverty and narrow the poverty gap, given that South Africa was tenth in the world list of countries with the widest gap between rich and poor.

The president suffered a setback in August 2012 when police shot and killed 34 striking platinum miners at the Marikana mine, near Johannesburg. Poorly paid and working in difficult conditions, the miners were demanding wage increases from the mine-owners, a British company called Lonmin. To make matters worse, 270 miners were arrested and charged with the murder of their colleagues, on the grounds that their behaviour had caused the police action. A wave of outrage followed and President Zuma came under severe criticism for his handling of the crisis. Although the charges were later dropped, critics claimed that he was an ineffective leader, more interested in protecting the industry rather than helping the poverty-stricken miners and working to narrow the poverty gap. In December 2012 he was re-elected leader of the ANC for another five years. However, many observers see his continuing presence as the party's Achilles heel. According to the *Guardian* (18 December 2012), Zuma is 'a man steeped in corruption and personal scandal'.

25.9 SOCIALISM AND CIVIL WAR IN ETHIOPIA

(a) Haile Selassie

Ethiopia (Abyssinia) was an independent state, ruled since 1930 by the Emperor Haile Selassie. In 1935 Mussolini's forces attacked and occupied the country, forcing the Emperor into exile. The Italians joined Ethiopia to their neighbouring colonies of Eritrea and Somaliland, calling them Italian East Africa. In 1941, with British help, Haile Selassie was able to defeat the weak Italian forces and return to his capital, Addis Ababa. The wily

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emperor scored a great success in 1952 when he persuaded the UN and the USA to allow him to take over Eritrea, giving his landlocked country access to the sea. However, this was to be a source of conflict for many years, since Eritrean nationalists bitterly resented the loss of their country's independence.

By 1960 many people were growing impatient with Haile Selassie's rule, believing that more could have been done politically, socially and economically to modernize the country. Rebellions broke out in Eritrea and in the Ogaden region of Ethiopia, where many of the population were Somali nationalists who were keen for their territories to join Somalia (which had become independent in 1960). Haile Selassie hung on to power, without introducing any radical changes, into the 1970s. Fuelled by poverty, drought and famine, unrest finally came to a head in 1974, when some sections of the army mutinied. The leaders formed themselves into the Co-ordinating Committee of the Armed Forces and Police (known as the Derg for short), whose chairman was Major Mengistu. In September 1974, the Derg deposed the 83-year-old emperor, who was later murdered, and set itself up as the new government. Mengistu gained complete control and remained head of state until 1991.

(b) Major Mengistu and the Derg

Mengistu and the Derg gave Ethiopia 16 years of government based on Marxist principles. Most of the land, industry, trade, banking and finance were taken over by the state. Opponents were usually executed. The USSR saw the arrival of Mengistu as an excellent chance to gain influence in that part of Africa, and they provided armaments and training for Mengistu's army. Unfortunately the regime's agricultural policy ran into the same problems as Stalin's collectivization in the USSR; in 1984 and 1985 there were terrible famines, and it was only prompt action by other states, rushing in emergency food supplies, which averted disaster. Mengistu's main problem was the civil war, which dragged on throughout his period in power and swallowed up his scarce resources. In spite of the help from the USSR, he was fighting a losing battle against the Eritrean People's Liberation Front, the Tigray People's Liberation Front and the Ethiopian People's Revolutionary Democratic Front (EPRDF). By 1989 the government had lost control of Eritrea and Tigray, and Mengistu admitted that his socialist policies had failed; Marxism–Leninism was to be abandoned. The USSR deserted him; in May 1991, with rebel forces closing in on Addis Ababa, Mengistu fled to Zimbabwe and the EPRDF took power.

(c) The Ethiopian People's Revolutionary Democratic Front (EPRDF)

The new government, while maintaining some elements of socialism (especially state control of important resources), promised democracy and less centralization. The leader, Meles Zenawi, who was a Tigrayan, announced the introduction of a voluntary federation for the various nationalities; this meant that ethnic groups could leave Ethiopia if they chose, and it prepared the way for Eritrea to declare its independence in May 1993. This was one less problem for the regime to deal with, but there were many others. Most serious was the state of the economy, and yet another dreadful famine in 1994. In 1998 war broke out between Ethiopia and Eritrea over frontier disputes. Even the weather was uncooperative: in the spring of 2000 the rains failed for the third year in succession, and another famine threatened. Although a peace settlement with Eritrea was signed in December 2000, tensions remained high.

Events in 2001 suggested that Ethiopia might have turned the corner, at least economically. Prime Minister Zenawi and his EPRDF, who had easily won the national elections

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in May 2000, went on to register another landslide victory in the local elections in 2001. The economy grew by 6.5 per cent, the rains arrived on time and there was a good harvest. The World Bank helped by cancelling almost 70 per cent of Ethiopia's debt. Zenawi won the 2005 elections, though there were allegations of fraud followed by riots and protest demonstrations in which at least 200 people were killed. The opposition accused the police of massacring protesters, while the government blamed one of the main opposition parties, the Coalition for Unity and Democracy (CUD), for organizing the protests. In fact the majority of foreign observers declared that the elections were basically free and fair. With Zenawi in charge for the next five years, economic growth continued, but at the end of 2006 Ethiopia became involved in war with neighbouring Somalia. In the south of Somalia, bordering on Ethiopia, Islamist groups were fighting against the National Transitional Federal Government of Somalia, which was supported by the USA (see Section 25.13(b)). It was suspected that these Islamist groups had links with al-Qaeda, and Ethiopia had already allowed the USA to station military advisers at Camp Hurso, where they had spent a year training the Ethiopian army. In December 2006 the Ethiopians took the offensive, forced the Islamists to retreat and occupied the areas formerly under Islamist control. They pulled out in January 2009, leaving behind a small African Union force and a small detachment of the Somali army. But they were not strong enough to keep the Islamists at bay, and they soon began to take back control of southern Somalia. Re-elected in 2010 for a further five-year term, Zenawi died in August 2012 aged only 57. His deputy, Hailemariam Desalegn, took over, and was expected to remain prime minister until the next elections, due in 2015. However, there were fears that, since the new prime minister lacked the experience, the prestige and the charisma of Mr Zenawi, the country was in for a difficult few years.

25.10 LIBERIA – A UNIQUE EXPERIMENT

(a) Early history

Liberia has a unique history among African states. It was founded in 1822 by an organization called the American Colonization Society, whose members thought it would be a good idea to settle freed slaves in Africa where, by rights, they ought to have been living in the first place. They persuaded several local chieftains to allow them to start a settlement in West Africa. The initial training of the freed slaves to prepare them for running their own country was carried out by white Americans, led by Jehudi Ashmun. Liberia was given a constitution based on that of the USA, and the capital was named Monrovia after James Monroe, US president from 1817 until 1825. Although the system appeared to be democratic, in practice only the descendants of American freed slaves were allowed to vote. The native Africans in the area were treated as second-class citizens, just as they were in the areas colonized by Europeans. In the late 1920s there was a scandal when the US State Department accused the Liberian government of selling large numbers of these citizens into slavery. The League of Nations carried out an investigation and in 1930 published a report showing that this was indeed the case. There were probably mixed motives: to make money for the poverty-stricken government and to get rid of troublemakers from native tribes in the interior. The president, Charles King, was forced to resign, but a further investigation in 1935, this time by the Anti-Slavery Society, showed that the practice was still going on. One of the investigators was the British novelist, Graham Greene.

Liberia gained new importance during the Second World War because of its rubber plantations, which were a vital source of natural latex rubber for the Allies. The Americans poured cash into the country and built roads, harbours and an international airport at

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Monrovia. In 1943, William Tubman of the True Whig Party – the only major political party – was elected president; he was continually re-elected and remained president until his death in 1971, shortly after his election for a seventh term. He presided over a largely peaceful country, which became a member of the UN and a founder member of the Organization of African Unity (1963). But the economy was always precarious; there was little industry and Liberia depended heavily on her exports of rubber and iron ore. Another source of income came from allowing foreign merchant ships to register under the Liberian flag. Shipowners were keen to do this because Liberia's rules and safety regulations were the most lax in the world and the registration fees among the lowest.

(b) Military dictatorship and civil war

President Tubman was succeeded by his vice-president, William Tolbert, but during his presidency things began to go badly wrong. There was a fall in the world prices of rubber and iron ore and the ruling elite came under increasing criticism for its corruption. Opposition groups developed and in 1980 the army staged a coup, led by Master Sergeant Samuel Doe. Tolbert was overthrown and executed in public along with his ministers, and Doe became head of state. He promised a new constitution and a return to civilian rule, but was in no hurry to relinquish power. Although elections were held in 1985, Doe made sure that he and his supporters won. His ruthless regime aroused determined opposition and a number of rebel groups emerged; by 1989 Liberia was engaged in a bloody civil war. The rebel armies were poorly disciplined and guilty of indiscriminate shooting and looting. In spite of efforts by neighbouring West African states which intervened in an attempt to bring peace, Doe was captured and killed (1990); but this did not end the war: two of the rebel groups, led by Charles Taylor and Prince Johnson (the man responsible for Doe's murder), fought each other for control of the country. Altogether this devastating conflict raged on for seven years; new rival factions appeared; at one point Taylor's forces invaded Sierra Leone which he accused of backing Prince Johnson who controlled the capital, Monrovia. The Organization of African Unity tried to broker talks under the chairmanship of former Zimbabwean president Canaan Banana; but it was not until 1996 that a cease-fire was agreed. Taylor succeeded in winning the support of Nigeria and announced that he wanted to be a conciliator.

Elections held in 1997 resulted in a decisive victory for Charles Taylor and the National Patriotic Front of Liberia Party. He faced an unenviable task: the country was literally in ruins, its economy was totally disrupted and its peoples were divided. Nor did the situation improve. Taylor soon found himself at odds with much of the outside world: the USA criticized his human rights record and the European Union claimed that he was helping the rebels in Sierra Leone. After the terrorist attacks of 11 September 2001, the USA accused him of harbouring members of al-Qaeda. Taylor denied all these charges and accused the USA of trying to undermine his government. The UN voted to impose a worldwide ban on the trade in Liberian diamonds.

By the spring of 2002 the country was once again in the grip of civil war as rebel forces in the north launched a campaign to overthrow Taylor. Again the ordinary people suffered appallingly: by the end of the year, 40 000 had fled the country and a further 300 000 were only kept alive by food aid from the UN. In August 2003 the UN Security Council decided to send security forces into Liberia and about a thousand Nigerian troops were airlifted into Monrovia to prevent rebel forces taking it. Taylor resigned and took refuge in Nigeria. All the various factions met and signed a peace agreement. There was to be a two-year transitional period, during which a UN force of 3500 troops from several West African countries would keep the peace. Democratic elections were held in October and November 2005 in which the final run-off was won by Ellen Johnson-Shirleaf, who became Africa's

first female head of state. She had been educated at Harvard, and had worked as an economist for the World Bank.

In 2006 ex-president Charles Taylor was handed over to an international court at the Hague and charged with crimes against humanity alleged to have been committed in the 1990s when he intervened to support the rebels in the civil war in Sierra Leone. In April 2012 he was found guilty of being responsible for murder, rape, sexual slavery and conscription of child soldiers. He was sentenced to 50 years in prison. Meanwhile in 2011 president Johnson-Shirleaf was a joint winner, along with two other African female politicians from Liberia and Yemen, of the Nobel Peace Prize for their work for the safety of women and for women's rights. Later in the year she was re-elected president for a second term.

25.11 STABILITY AND CHAOS IN SIERRA LEONE

(a) Early prosperity and stability

Sierra Leone became independent in 1961 with Sir Milton Margai as leader and with a democratic constitution based on the British model. It was potentially one of the richest states in Africa, with valuable iron-ore deposits and diamonds; later gold was discovered. Sadly, the enlightened and gifted Margai, widely seen as the founding father of Sierra Leone, died in 1964. His brother, Sir Albert Margai, took over as leader, but in the election of 1967, his party (the Sierra Leone People's Party – SLPP) was defeated by the All-People's Congress (APC) and its leader Siaka Stevens. In a foretaste of the future, the army removed the new prime minister and installed a military government. This had only been in place for a year when some sections of the army mutinied, imprisoned their officers and restored Stevens and the APC to power. Stevens remained president until his retirement in 1985.

Sierra Leone under Siaka Stevens enjoyed peace and stability, but gradually the situation deteriorated in a number of ways.

- Corruption and mismanagement crept in and the ruling elite lined their own pockets at public expense.
- The deposits of iron ore ran out, and the diamond trade, which should have filled the state treasury, fell into the hands of smugglers, who siphoned off most of the profits.
- As criticism of the government increased, Stevens resorted to dictatorial methods. Many political opponents were executed, and in 1978 all political parties except the APC were banned.

(b) Chaos and catastrophe

When Stevens retired in 1985 he took care to appoint as his successor another strong man, the Commander-in-Chief of the army, Joseph Momoh. His regime was so blatantly corrupt and his economic policies so disastrous that in 1992 he was overthrown, and replaced by a group calling itself the National Provisional Ruling Council (NPRC). The new head of state, Captain Valentine Strasser, accused Momoh of bringing the country 'permanent poverty and a deplorable life', and promised to restore genuine democracy as soon as possible.

Unfortunately the country was already moving towards the tragic civil war, which was to last into the next century. A rebel force calling itself the Revolutionary United Front

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(RUF) was organizing in the south, under the leadership of Foday Sankoh. He had been an army corporal who, according to Peter Penfold (a former British High Commissioner in Sierra Leone), 'brainwashed his young followers on a diet of coercion, drugs, and unrealistic promises of gold'. His forces had been causing trouble since 1991, but the violence intensified; Sankoh rejected all calls to negotiate, and by the end of 1994 the Strasser government was in difficulties. Early in 1995 there were reports of fierce fighting all over the country, although Freetown (the capital) was still calm. An estimated 900 000 people had been driven from their homes and at least 30 000 had taken refuge in neighbouring Guinea.

In desperation Strasser offered to hold democratic elections and to sign a truce with the RUF. This produced a lull in the fighting and preparations went ahead for elections to be held in February 1996. However, some sections of the army were unwilling to give up power to a civilian government, and a few days before the election they overthrew Strasser. Nevertheless, voting went ahead, though there was serious violence, especially in Freetown, where 27 people were killed. There were reports of mutinous soldiers firing at civilians as they queued up to vote, and chopping off the hands of some people who had voted. In spite of intimidation, 60 per cent of the electorate voted. The Sierra Leone People's Party (SLPP) emerged as the largest party and its leader, Ahmad Tejan Kabbah, was elected president. Enormous crowds celebrated in Freetown when the army formally handed over authority to the new president, after 19 years of one-party and military rule. President Kabbah pledged to end violence and corruption and offered to meet RUF leaders. In November 1996 he and Sankoh signed a peace agreement.

Just as it seemed that peace was about to return, the country was plunged into further chaos when a group of army officers seized power (May 1997), forcing Kabbah to take refuge in Guinea. The new president, Major Johnny Paul Koroma, abolished the constitution and banned political parties. Sierra Leone was suspended from the Commonwealth and the UN imposed economic sanctions until the country returned to democracy. Nigerian forces fighting on behalf of the Economic Community of West African States (ECOWAS) drove Koroma's military regime out and restored Kabbah (March 1998).

But this was not the end of Sierra Leone's misery. The RUF resurrected itself and was joined by troops loyal to Koroma. They advanced on Freetown, which they reached in January 1999. Then followed the most appalling events of the entire civil war: in a ten-day period about 7000 people were murdered, thousands more were raped or had their arms and legs hacked off, about a third of the capital was destroyed and tens of thousands were left homeless. Eventually Kabbah and Sankoh signed a peace agreement in Lomé, the capital of Togo (July 1999), providing for a power-sharing system and granting an amnesty for the rebels. This provoked strong criticism from human rights groups in view of the terrible atrocities committed by some of the rebels. The UN Security Council voted to send 6000 troops to Sierra Leone to supervise the implementation of peace. Unbelievably, in May 2000 Sankoh, who had become a member of Kabbah's cabinet, ordered his rebel troops to march on Freetown and overthrow the Kabbah government. This was prevented by the timely arrival of British troops sent by UK prime minister Tony Blair. In October 2000 this number had to be increased to 20 000, since many of the RUF fighters refused to accept the terms of the settlement and continued to cause havoc. British troops joined the UN forces and played an important part in the final defeat of the rebels. Sankoh was captured and died in prison in 2003. The job of disarmament was slow and difficult, but violence gradually subsided and something approaching calm was restored. In January 2002 the war was officially declared to be over; it was estimated that 50 000 people had been killed during ten years of conflict.

However, peace was fragile, and the UN kept 17 000 troops in the country, and some of the British contingent stayed in case of renewed violence. In May 2002 President Kabbah was re-elected, winning 70 per cent of the votes. In 2004 it was announced that

all rebel troops had been disarmed and the UN opened a war crimes tribunal. But the country's economy was in ruins, the infrastructure needed rebuilding, and in 2003 the UN rated it as one of the five poorest countries in the world.

The constitution did not allow President Kabbah to run for a third consecutive term, and his party, the Sierra Leonean People's Party (SLPP), chose the vice-president, Solomon Berewa, as their candidate in the elections of September 2007. He was unexpectedly defeated by the All People's Party (APC) candidate, Ernest Bai Koroma. He promised that corruption would not be tolerated and that the country's resources would be used in the best interests of all citizens. Further work was done to restore the country's infrastructure and more resources were put into the healthcare system. In April 2010 a new free healthcare system was introduced for pregnant women, mothers and babies, and children under 5. In 2008, after an aircraft carrying around 700 kg of cocaine was stopped at Freetown airport, President Koroma took action against the increasing number of drug cartels, many of them from Colombia, which had started to use Sierra Leone as a base from which to ship drugs to Europe. The minister for transport was suspended and stricter punishments and longer gaol sentences were introduced for offenders. As the 2012 elections approached, there was still a long way to go before Sierra Leone came anywhere near fulfilling its potential.

25.12 ZIMBABWE UNDER ROBERT MUGABE

(a) An impressive beginning, 1980–90

Robert Mugabe, prime minister of the newly independent Zimbabwe, had been an uncompromising guerrilla leader with Marxist opinions. He soon showed that he was capable of moderation, and pledged himself to work for reconciliation and unity. This calmed the fears of the white farmers and businessmen who had remained in Zimbabwe and who were necessary for the economy to flourish. He formed a coalition government between his party, the Zimbabwe African National Union (ZANU), whose main support came from the Shona people, and Joshua Nkomo's Zimbabwe African People's Union (ZAPU), supported by the Ndebele people in Matabeleland. He kept his promise made at the Lancaster House Conference (see Section 24.4(c)) that the whites should have 20 guaranteed seats in the 100-seat parliament. Measures were introduced to alleviate the poverty of the black population – wage increases, food subsidies and better social services, health care and education. Many commentators felt that in his first few years in power, Mugabe showed great statesmanship and deserved credit for keeping his country relatively peaceful.

Nevertheless there were problems to be dealt with. The most serious in the early years was the long-standing hostility between ZANU and ZAPU. The Shona people of ZANU felt that ZAPU could have done more to help during the struggle for black majority rule. The coalition between Mugabe and Nkomo was uneasy, and in 1982 Nkomo was accused of planning a coup. Mugabe forced him to resign and had many leading members of ZAPU arrested. Nkomo's supporters in Matabeleland retaliated with violence, but were brutally suppressed. However, resistance continued until 1987 when at last the two leaders reached agreement – the so-called Unity Accord:

- ZANU and ZAPU united and became known as the Zimbabwe African National Union-Patriotic Front (ZANU-PF);
- Mugabe became executive president and Nkomo became a vice-president in a power-sharing scheme;
- reserved seats for whites in parliament were abolished.

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The other worrying problem was the state of the economy. Although in years of good harvests Zimbabwe was regarded as 'the breadbasket of southern Africa', success depended heavily on the weather. During the 1980s there were more than the usual periods of drought, and the country also suffered from the high world price of oil. It was becoming clear that although Mugabe was a clever politician, his economic skills were not so impressive. Since the 1987 Unity Accord, he had been pushing to turn Zimbabwe into a one-party state. However, this was thwarted when Edgar Tekere formed his Zimbabwe Unity Movement (ZUM) in 1989. Nevertheless, in 1990 Mugabe was still immensely popular and regarded as a hero by much of the population because of his vital role in the struggle for freedom. In 1990 he was re-elected president in a landslide victory over ZUM.

(b) The hero's image begins to tarnish

During the 1990s Zimbabwe's economic problems worsened. After the collapse of the USSR, Mugabe abandoned most of his Marxist policies and attempted to follow western free-market methods. He accepted a loan from the IMF and, very much against public opinion, agreed to abide by the Economic Structural Adjustment Programme it imposed. This involved unpopular cuts in public spending on social services and jobs. Difficulties were compounded in 1992 by a severe drought, bringing a poor harvest and food shortages. More problems were caused when squatters occupied hundreds of white-owned farms. About 4000 white farmers had stayed on in Zimbabwe after independence, and between them they owned about half the country's arable land. The government encouraged the squatters and the police gave the farmers no protection; consequently the areas occupied by squatters were not cultivated, and this added to the food supply problem. Unemployment and inflation rose and the spread of AIDS began to cause concern.

By the late 1990s unrest was growing. Mugabe's intervention to help President Laurent Kabila in the civil war in the Democratic Republic of the Congo was unpopular, since it was widely rumoured that his motive was to protect his own personal investments in that country. In November 1998 there were protest demonstrations when it was announced that Mugabe had awarded himself and his cabinet large pay increases.

(c) Opposition increases

Around the turn of the century, opposition to the regime increased as Mugabe's rule became more repressive and dictatorial.

- In February 2000, men claiming to be veterans of the war for independence began the systematic and violent occupation of white-owned farms. This continued throughout the next four years, and was clearly a deliberate policy organized by the government. When the UK government protested, Mugabe claimed that it was the fault of the British: they had broken their promise (made during the 1979 Lancaster House Conference) to provide adequate compensation to white farmers. Britain declared itself willing to pay extra compensation provided that the confiscated land was given to ordinary peasant farmers rather than to members of Mugabe's ruling elite.
- Another proviso was that the elections due in June 2000 were free and fair. In February 2000, the people had rejected a new pro-Mugabe draft constitution, a clear indication that his popularity had dwindled. This probably led him to take whatever measures were necessary to win the June elections. Although he had agreed that they should be free and fair, he apparently did little to make sure that this happened.

There was widespread violence and intimidation of the opposition before and during the election, and international observers were severely restricted. Even so, the result was close: Mugabe's ZANU-PF won 62 seats in the 150-seat parliament, while the opposition Movement for Democratic Change (MDC) won 57. The MDC had support from trade unions and by the prominent, but mainly white Commercial Farmers' Union (CFU). However, the president had the right to nominate 30 of the 150 members, and so Mugabe maintained a comfortable majority.

- The forcible occupation of white-owned farms continued during 2001, bringing more protests from the UK and the USA. Mugabe accused the British government of running a neo-colonial and racist campaign, supporting whites against blacks. The dispute brought mixed reactions from the rest of the world. The majority of black African states expressed sympathy and support for Mugabe. President Mbeki of South Africa, on the other hand, claimed that the land seizures were a violation of the rule of law, and ought to stop; but he urged a conciliatory approach and refused to apply economic sanctions against Zimbabwe, since these would only ruin the already ailing economy. However, the EU condemned Mugabe's policy and imposed sanctions (February 2002), the Commonwealth expelled Zimbabwe for one year, and the World Bank cut off its funding because of Zimbabwe's huge debt arrears, which had risen to over $380 million.
- Meanwhile, Mugabe took steps to muzzle the mounting criticism of his policies within Zimbabwe. There was now only one independent daily newspaper, the *Daily News*, and its journalists were increasingly harassed and intimidated, as were members of the MDC. Morgan Tsvangirai, the MDC leader, was charged with plotting to overthrow the president, and the government tightened its control over TV and radio. When the Supreme Court ventured to criticize Mugabe's land policy, he sacked three of the judges and replaced them with his own nominees. As the presidential election of March 2002 approached, restrictions were tightened further. Public meetings were banned, except those of Mugabe's supporters, and it became an offence 'to undermine the authority of the president by making statements or publishing statements that provoke hostility'. No foreign observers were to be allowed into the country to monitor the elections.

During the election campaign ZANU-PF took the line that the MDC was a puppet political party being used by the West to destabilize the nationalist and fundamentally Marxist attempt to redistribute wealth in Zimbabwe. Jonathan Moyo, the Minister of Information and Publicity, accused the MDC of being unpatriotic because they supported the CFU in their attempts to derail Mugabe's land-redistribution exercise. It was no surprise when Mugabe won the election and was sworn in for a further six-year term, although he was 78 years old. He took 56 per cent of the vote while Morgan Tsvangirai could muster only 42 per cent. Tsvangirai immediately challenged the result, claiming that 'it was the biggest electoral fraud I've seen in my life'. He complained of terrorism, intimidation and harassment; tensions ran high as he demanded that the High Court overturn the result.

(d) Zimbabwe in crisis

Rejecting the opposition's accusations, President Mugabe declared a 'state of disaster' (April 2002) because of the food situation. The whole of Central Africa was suffering the effects of a prolonged drought, and the harvest was expected to be only half its usual size. Yet Mugabe continued with his controversial land-seizure policy, although agricultural experts pointed out that this would threaten the vital crop of winter wheat.

Protests against the government continued in various forms, and so did the suppression

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of criticism. Mugabe used almost every means possible to stay in power: war veterans, youth militias and members of the security forces were used to intimidate the opposition. In February 2003 the Cricket World Cup competition was held in Zimbabwe; in Zimbabwe's opening match, two of their players – one black and one white – wore black armbands in order, they said, to 'mourn the death of democracy in our beloved Zimbabwe. We cannot in all conscience take the field and ignore the fact that millions of our compatriots are starving, unemployed and oppressed.' They did not play for Zimbabwe again. Later in the month, 21 Christian church leaders were arrested when they tried to present a petition asking the police to behave with less violence and more regard for human rights.

But the opposition refused to be silenced; in March the MDC organized a mass protest across the whole country, demanding that Mugabe should either reform his regime or leave office. Many factories, banks and shops closed, but the government dismissed it as 'an act of terrorism'. It was reported that over 500 opposition members, including Gibson Sibanda, vice-president of the MDC, had been arrested. Supported by a number of Western countries, the MDC called for foreign intervention and appealed for the UN to get involved in future elections. They also called on neighbouring states, asking them to take a more active role in Zimbabwe's affairs. Through the regional Southern African Development Community (SADC) there were a number of attempts at mediation. Presidents Mbeki of South Africa and Obasanjo of Nigeria several times tried to persuade Mugabe to form a coalition government with the MDC, but although representatives of Mugabe and Tsvangirai held talks, no solution to the deadlock could be found. Mugabe insisted that Zimbabwe was a sovereign country which could run its own affairs without interference from other states; issues pertaining to Zimbabwe could only be solved by Zimbabweans themselves. He also argued that Western talk of human rights abuses in Zimbabwe was simply political rhetoric and part of a neo-colonial strategy to continue influencing what went on in Zimbabwe. Jonathan Moyo has linked the recent farm seizures to the 1970s war of liberation from British colonial rule. He described the farm takeovers as the third 'Chimurenga', a Shona word for the war of liberation, the first and second Chimurenga being the wars started by black natives against white settlers during the 1890s and 1970s.

When the Commonwealth summit met in Abuja (Nigeria) in December 2003, the issue which dominated the conference was whether or not Zimbabwe's suspension should be lifted. Mugabe was hoping to split the Commonwealth along black–white lines, but after intense discussion, the majority of members, including many African countries, voted to continue the suspension. Bitterly disappointed, Mugabe withdrew Zimbabwe from the Commonwealth.

The tragedy was that by the summer of 2004, as well as the dire human rights situation, Zimbabwe's economy was in a state of collapse. It was reported that since the land reform programme began, agricultural production had fallen catastrophically: in 2003 the tobacco crop fell to less than a third of the 2000 crop; worst of all, the wheat crop was less than a quarter of the total in 2000, and the numbers of cattle on commercial farms fell from 1.2 million to a mere 150 000. Although the government claimed that 50 000 black families had been settled on commercial farms, the real figure was less than 5000. Many of the best farms had been given to the president's supporters; vast amounts of fertile land were lying uncultivated because of shortages of seeds, fertilizers and agricultural machinery. In May 2004, the unemployment rate stood at over 70 per cent and the inflation rate was over 600 per cent, one of the highest in the world. The EU decision to continue sanctions for a further year did nothing to help. As usual, the main victims were Zimbabwe's poverty-stricken, oppressed and neglected people.

In spite of all this, Mugabe's ZANU-PF party won a decisive victory in the parliamentary elections of April 2005, taking 78 seats out of the 120 contested. The opposition MDC could muster only 41 seats. With the 30 seats that the president could fill with his own

appointments, he would have more than the two-thirds majority needed to change the constitution. A smiling Mugabe said that he would retire when he was 'a century old'. There was less violence than during the two previous elections, and South African observers reported that the proceedings had been free and fair. However, the MDC and many European observers claimed that there had been widespread abuses, fraud and intimidation of voters; they accused the South African government of turning a blind eye to the fraud in order to discourage the MDC from resorting to violence, which would destabilize South Africa's frontier with Zimbabwe. In fact, the MDC leader, Morgan Tsvangirai, a former trade union leader, decided not to launch a legal challenge to the results and rejected calls for armed resistance. As the UK *Times* put it: 'It would be a brave group indeed which would openly confront the thugs of ZANU-PF.' In March 2007 when the MDC did criticize Mugabe and staged a protest march, Tsvangirai and several other protesters were arrested and beaten up and one of them was killed.

In 2008 both parliamentary and presidential elections were held. With the economy in dire straits, Mugabe's ZANU-PF suffered a narrow defeat by the MDC, and Mugabe himself came second to Morgan Tsvangirai in the first round of the election for president. However, Tsvangirai had narrowly failed to win the requisite 50 per cent to secure victory in the first round. A run-off took place almost two months after these results were announced. During that time ZANU-PF launched a campaign of violence against the MDC and its supporters in which 86 people were reported killed, hundreds injured and hundreds more driven from their homes. Five days before the run-off Tsvangirai announced that he had withdrawn from the contest; there was no point in running, he said, when the election would not be free and fair, and when the outcome would be decided by Mugabe himself. He claimed that his supporters risked being killed if they turned up to vote for him. Mugabe retorted that he had only withdrawn because he knew he would be humiliated in the vote. The run-off went ahead and predictably, since Tsvangirai was no longer a candidate, Mugabe took around 90 per cent of the votes. In June 2008 he was sworn in for a further term as president. There was widespread international condemnation of the result, and the African Union insisted that the only fair outcome would be the formation of a government of national unity. Talks were held between ZANU-PF and the MDC under the auspices of the Southern African Development Community (SADC), and mediated by South African president Mbeki. In September 2008 a power-sharing agreement was signed: Mugabe was to remain as president, Tsvangirai was to become prime minister, both would share control of the police and Mugabe's ZANU-PF would be in control of the army.

Over the next four years the economy at last began to make some progress, although in June 2012 an MDC report stated that 'the transport system remains in a complete shambles'; all major roads were in need of upgrading and the secondary roads were full of potholes. At the same time the UN Human Rights Commissioner reported that in spite of the unity government, polarization was still very pronounced; she expressed grave concerns that the next elections, due in 2013, could turn into a repeat of the 2008 elections. Only a week after the Commissioner's visit an MDC official was murdered by ZANU-PF supporters and several others were severely beaten. Clearly Mugabe's conception of sovereignty has more to do with the perpetuation of his own rule than the protection and well-being of his people. In the words of one of the disaffected Anglican priests, in 2012:

> Zimbabweans continue to suffer under Mugabe's rule. There is general suffering across Zimbabwe, and unemployment is a serious problem in every part of the country. Moreover the involvement of the military in the politics of the country means that the idea of free and fair elections continues to be a fantasy in the minds of many Zimbabweans.

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25.13 CONFUSION AND CIVIL WAR IN SOMALIA

(a) Somalia united

The territories occupied by the Somali people had been colonized in the nineteenth century by the French, British and Italians. By 1960 both Britain and Italy recognized the independence of their areas which were united to form the Republic of Somalia. There was a long history of frontier disputes between the Somalis in the south-west of the country neighbouring Kenya, and between the Somalis in the north-west of Somalia, bordering on the Ethiopian province of Ogaden, and the Ethiopian government. In 1963 a boundary commission recommended that the Somali-populated area bordering on Kenya should be included in the new Republic of Kenya. When the British government agreed to this there were protest riots across Somalia and the Somali government broke off diplomatic relations with Britain. This alarmed Ethiopia where border skirmishes had already occurred in Ogaden in 1962. The president of Sudan and the King of Morocco offered to mediate, and following talks in Khartoum, hostilities between Somalia and Ethiopia were suspended temporarily. However, sporadic border clashes continued until 1967 when President Kaunda of Zambia mediated more successfully. Meanwhile the small French colony of Djibouti, situated between Somalia and Eritrea, voted to remain separate as a member of the French Union. The French finally withdrew in 1975 and Djibouti became an independent republic in 1977. Though small, the new republic included the port of Djibouti, which was vital for the trade of the landlocked state of Ethiopia and extremely desirable for Somalia. The republic's population was mixed, consisting both of Ethiopians (Afars) and Somalis (Issas).

In October 1969 the Somali president Abdi Rashid Ali Shermarke was assassinated and the army took over, with Major-General Mohamed Siad Barre as president. The country's name was changed to the Somali Democratic Republic, but this did not solve one of its basic problems – it was divided into a large number of tribes or clans, and sub-tribes. Before independence these had only been held together by the colonial power, and after 1960 some tribes began to act more independently. The new president Siad Barre, a member of the Marehan tribe, aimed to reassert central control from the capital, Mogadishu, with himself as the uniting force. He gained the support of several other clans and introduced a programme of socialist reforms.

(b) War and civil war

In 1977, expecting help from the USA, President Siad Barre launched an ill-advised invasion of Ethiopia. When American help failed to materialize, his forces were easily driven back by the Ethiopians, who received support from the USSR and Cuba. After the Ethiopians had invaded Somalia in 1982, the country gradually deteriorated into a terrible civil war lasting well into the next century. The former British area in the north declared itself independent under President Muhammad Egal, though only Djibouti gave it official recognition. A number of tribes united and in 1991 forced Barre to leave the country. However, they immediately fell out again and continued to fight each other. The leading figures were now Muhammad Farah Aided, who was supported by Islamist groups, and Ali Mahdi Muhammad, whose forces controlled Mogadishu and who declared himself president.

Meanwhile the unfortunate population suffered famine, epidemics and drought; millions were forced to flee from their homes. At one point there were over 20 different aid agencies at work in the country. Sadly they were often terrorized and robbed by local

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militias, and at the end of 1992 a UN mission (known as UNOSOM) was sent to try to make sure that the aid reached the right people. This group was eventually enlarged to 28 000 (of which 8000 were from the USA) and given authority to disarm the warring factions. When this proved beyond them, the Americans decided it would be easier to back Ali Mahdi and eliminate Aided, rather than trying to bring the two together in peace talks. They were in for a great disappointment: an American force sent to arrest Aided failed to capture him and lost two helicopters and the lives of 18 teenage American soldiers. This was too much for President Clinton, who decided to pull all American troops out of Somalia. UNOSOM forces soon followed (1994). They had totally failed to disarm the militias and certainly to reunite the country. Aided was killed in 1996 but it seemed to make little difference. In reality, Somalia had no government, just a collection of warlords each ruling his own patch.

In 2000 it seemed that some progress was being made: a group of warlords met in Djibouti and set up a government, though at first it controlled only about 10 per cent of the country. In August 2004 a National Transitional Federal Parliament of 275 members was inaugurated for a five-year term and Abdullahi Yusuf Ahmed was elected president. The new government was forced to spend the first year based in Kenya, because Somalia itself was too violent, but eventually it was able to move to the town of Baidoa. More violence followed in 2006, this time caused by a group of Islamists calling themselves the Somali Islamic Courts Council (SICC). They seized Mogadishu and took control of most of the south. President Yusuf tried to reach a peace agreement with them, but no progress could be made. At this point the Ethiopian government intervened. They considered the Islamists to be a dangerous threat to their territory and to the region in general, and carried out a series of air strikes against them. Ethiopian troops joined the Somali government's struggling forces and together they regained control of Mogadishu. By the end of 2006 most of the Islamists had been forced out of Somalia. The Americans joined in, launching air strikes against the retreating Islamists whom they suspected of having links with al-Qaeda. These were widely condemned in a number of Muslim countries which claimed that the Americans had killed more ordinary Somalis than Islamist rebels.

The Islamists soon regrouped and the militant wing of the SICC, known as Al-Shabab, grew much stronger in 2007. Supported by many local warlords, they recaptured much of the south. One encouraging sign for the beleaguered government was that many moderate Muslims supported it, and when President Yusuf resigned at the end of 2008, parliament elected Sheikh Sharif Ahmed, a moderate Muslim cleric, as the next president. In 2010 Al-Shabab announced that it acknowledged allegiance to al-Qaeda and in July it claimed responsibility for a bomb blast in a restaurant at Kampala, the capital of Uganda, which killed 75 people. Ugandan forces had been helping the Somali government, and the explosion was clearly meant as a warning to any other countries that might be considering similar assistance. Even the weather was cruel to the Somalis – in the summer of 2011 there was a prolonged drought. This caused a famine in most of the south where thousands were reported to have died from malnutrition and thousands more had migrated into neighbouring Kenya and Ethiopia looking for food. The government had proved incapable of controlling the Somali pirates who had been terrorizing the seas off the coast of East Africa for many years. Since 2000 hundreds of vessels have been attacked, though only a small proportion of these resulted in successful hijackings. Many countries have joined an international task force to eliminate piracy. This had some success and the number of attacks was reduced, though in February 2012 pirates were still holding ten ships and 159 hostages. In September 2012 Sheikh Sharif Ahmed was unexpectedly defeated when MPs voted for Hassan Sheikh Mohamud as the next president. He was described as being 'a more moderate Muslim' than his predecessor. He was an academic who had once worked for UNICEF.

25.14 THE SUDAN

At the end of the twentieth century no fewer than 17 African countries were experiencing crises of various kinds, and the UN rated Sudan as probably the worst. Since 1956, southern Sudan had been ravaged by civil war between the Arab-dominated government and the African tribes, many of whom were Christians. The Africans felt they were not receiving a fair deal; they had been refused the right to secede and had not even been allowed a certain amount of independence as part of a federal state. In 1983 the government in Khartoum introduced fundamentalist Islamic law, which only exacerbated the rift between Arabs in the north and the black African tribes in the south. Government forces were strongly influenced by the National Islamic Front (NIF) while the rebels' main supporters were the Sudan People's Liberation Army (SPLA). In 1989 a group of army officers led by Omar al-Bashir overthrew the Sudanese government and took over the presidency. He was still president in 2012 though he has promised to stand down in 2015. The fighting ended in 2002, but peace was fragile, and in February 2003 rebel groups from African tribes in the Darfur region again took up arms against the government in the struggle for more land and resources. In retaliation the government used various Arab militias including the Janjaweed to disguise the fact that they were really waging an ethnic cleansing campaign against people of African origin. The government itself did nothing to stop the violence. By the summer of 2004, the situation in the Darfur region was chaotic: some estimates put the number of deaths as high as 300 000, between 3 million and 4 million people were homeless, and over 2 million were in urgent need of food and medical attention. To make matters worse, consecutive years of drought and floods had ruined tens of thousands of livelihoods, and living conditions were said to be appalling. The infrastructure was in ruins, with scores of schools and hospitals destroyed, there was no electricity, disease was rife and trade depended on barter. UN and other aid agencies were desperately trying to provide for basic survival needs; food was dropped in from planes because there were no good roads. The whole of the south was desperately backward and under-developed. Yet the country had plenty of valuable assets which were not being fully exploited: the soil was fertile and watered by the Nile – properly cultivated, it could easily provide sufficient food for the population; and there were rich oil resources.

Hopes for an improvement rose in August 2004 when the African Union began a peacekeeping mission. In January 2005 representatives of the Sudan People's Liberation Movement and the Khartoum government signed a peace deal in Nairobi, the capital of Kenya. It was agreed that Southern Sudan would be autonomous for six years, and that there would then be a referendum to decide whether it was to remain part of the Sudan. However, the new deal seemed to have little immediate effect in Darfur, where fighting continued, in spite of all international efforts to bring peace. In March 2009 the International Criminal Court issued a warrant for the arrest of President Bashir on charges of war crimes and crimes against humanity in Darfur. He continued blithely in office and in April 2010 he won the first multi-party elections to be held in Sudan since 1986. This was no surprise since most of the opposition parties boycotted the elections. The leader of the SPLM, Salva Kiir, was re-elected for another term as president of the semi-independent Darfur.

In January 2011 the referendum over the future of Darfur provided for in the 2005 peace agreement took place; 98 per cent voted in favour of independence. President Bashir accepted the result and said he would not stand for re-election at the end of his term in 2015. In July 2011 South Sudan officially became independent as Africa's 54th state. Even then tensions between the two continued, mainly over possession of oil fields and disputed frontiers. In April 2012 the South took over some disputed oil fields but withdrew after the

Sudan launched air attacks. The African Union gave the two sides three months to resolve all their issues, but the future did not look promising.

25.15 AFRICA AND ITS PROBLEMS IN THE TWENTY-FIRST CENTURY

In November 2003 the UN secretary-general Kofi Annan complained that since the terrorist attacks of 11 September 2001 on the USA, the world's attention had focused on the war against terrorism, and that Africa and its problems had been, if not exactly forgotten, then certainly neglected. Resources that might have gone to help Africa had been diverted to Afghanistan and later to Iraq, which turned out to be a much more difficult problem than the USA had expected. He appealed for $3 billion (about £1.8 billion) to help provide basic services such as food, water, medical supplies and shelter. It was pointed out in comparison that the US Congress had voted to spend $87 billion on rebuilding Iraq.

After gaining independence from Ethiopia in 1993, **Eritrea** had a difficult time. There was continuing tension with Ethiopia over the exact position of their frontiers. Border clashes broke out in 1998. Both governments seemed to be obsessed with building up large armaments in case of a full-scale border war, and spent millions of dollars which they could ill afford on warplanes and weapons. Unfortunately, as well as using up vital resources, this also took men away from the farms where they were needed for ploughing and bringing water. Fortunately a peace agreement was signed at the end of 2000. Eritrea also suffered four consecutive years of drought; the once fertile plains were barren and the wind was blowing away the topsoil. The harvest was only 10 per cent of normal, and it was estimated that 1.7 million people were unable to feed themselves. Border tensions continued and clashes between frontier forces at some stage every year, the most serious recent skirmish being in January 2010 when Eritrean forces killed 10 Ethiopians.

Tanzania had the problem of how to deal with hundreds of thousands of refugees who had fled from the civil wars in Burundi and the Democratic Republic of the Congo. Similarly in West Africa, **Guinea's** frontier areas were crammed with refugees from neighbouring Sierra Leone and Liberia. Southern Africa was feeling the effects of drought. **Malawi** was badly affected: in January 2003 the government declared a national emergency after a drought and the failure of the maize crop. Then storms and heavy rains washed away bridges and flooded riverside fields; by April the World Food Programme claimed it was feeding around 3.5 million Malawians – a third of the population. Things did not improve in 2005 when more than 4 million people had insufficient food.

Lesotho, Mozambique and Swaziland were suffering from similar problems. The outlook for the future was not encouraging: experts were predicting that unless global warming could be controlled, droughts would become progressively worse and some parts of Africa might become uninhabitable (see Section 27.5). On top of this, all the countries of Africa were suffering in different degrees from the HIV/AIDS pandemic (see Section 28.4). In fact, although the West was understandably obsessed with the threat of terrorism, Africans were most concerned about AIDS, since, by and large, it was affecting the most active generations – the 20 to 50 age group.

On the other hand, there were encouraging developments on the political and economic front. At a summit conference of the Southern African Development Community (SADC) held in Mauritius in August 2004, a new charter of regulations for the conduct of democratic elections was drawn up. This included, among other things, allowing a free press, no vote-rigging, and no violence or intimidation. There was also to be a commitment by presidents to submit themselves for re-election when their term of office ended, and not to use armed force to keep themselves in power. As a demonstration of good faith, the presidents

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of Tanzania, Mozambique and Namibia indicated that they would be stepping down soon. In October 2008 the African Free Trade Zone was set up with 26 members. Experts believed that this would encourage African internal trade and boost economic development, as well strengthening the bloc's bargaining power when negotiating international trade agreements.

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QUESTIONS

1 Explain why the newly independent states in Africa suffered so many problems and assess to what extent the problems were of their own making.
2 How accurate do you think it is to describe Angola as 'a victim of the Cold War' during the years 1975 to 2002?
3 Explain why Robert Mugabe was regarded as a hero in Zimbabwe in the years 1980 to 1990, but had to face increasing opposition after 1990.
4 Assess the reasons why J. J. Rawlings was more successful as president of Ghana than Kwame Nkrumah.
5 How far would you agree that the Belgians should bear most of the responsibility for the outbreak of civil war in the Congo in 1960 and its continuation until 1965?
6 Why was apartheid in South Africa brought to an end, and how successfully did the ANC govern the country up until 2009?

There is a document question about Nelson Mandela and the anti-apartheid campaign in South Africa on the website.

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Chapter

26 Latin America

SUMMARY OF EVENTS

The area known as Latin America consists of the countries of South America, Central America including Mexico, and islands in the Caribbean Sea such as Cuba, Jamaica and Hispaniola (see Map 26.1). The latter is divided into two states – Haiti and the Dominican Republic. These states gained their independence from Spain – in the case of Brazil, from Portugal – in the early nineteenth century, and they had much in common. Spanish is spoken in most of these countries, though in Brazil Portuguese is the main language. They all shared similar difficulties: they were underdeveloped both industrially and agriculturally, and they had massive problems of poverty and illiteracy and unstable political systems. Revolutions, coups and assassinations were commonplace, and progress occurred only very slowly and unevenly. The USA provided economic aid for some of the states of Latin America, but its motives were not entirely selfless. In return the Americans expected to be able to exert political influence in order to prevent socialist or communist governments from gaining power. They had no hesitation in intervening in any Latin American country whose government was deemed unacceptable to them.

Consequently, following the end of the Second World War the USA was able to exercise a huge amount of economic, political and military influence, and Latin America found itself dragged into the Cold War. Republican presidents in particular were constantly suspicious that the USSR was trying to forge a Soviet–Latin American Axis, which would give the communists a clear advantage and pose a threat right on the USA's doorstep. US interventions to remove 'suspect' governments took place in Guatemala (1954), Cuba (1962), Brazil (1964), the Dominican Republic (1965), Chile (1970–3), Nicaragua (from 1979 onwards), Panama (1989) and Haiti (1994). However, the attempt to remove Fidel Castro from Cuba in 1962 failed miserably, and in 2012 his brother Raul was still in power (see Sections 7.4(b) and 8.2).

The international situation changed towards the end of the twentieth century with the ending of the Cold War. The demise of the communist 'enemy' – the Soviet Empire – removed the Americans' justification for their constant interventions. After half a century of US domination, Latin American states had more freedom to take control of their own affairs; no longer could the USA accuse them of aiming to become part of a communist power bloc. Venezuela was the first country to throw off US influence when, in 1998, Hugo Chávez was elected president on a programme of greater spending on social services to help alleviate poverty, and of making trading agreements with Cuba – absolute anathema to the USA! In 2002 right-wing forces backed by US finance tried to overthrow Chávez, but he survived. By this time he had become an inspiration to other Latin American voters: Brazil (2002), Argentina (2003), Chile (2005), Bolivia (2005) and Ecuador (2006) all elected presidents who, if not exactly left-wing, were determined to introduce changes that would give them greater freedom from control by Washington.

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Map 26.1 **Latin America**

Chávez was re-elected in 2000 and 2006 and again in 2012. These developments had serious consequences for the USA which, for one thing, was losing its economic, diplomatic and military advantages in South America. Some Latin American states began to look towards China as an important trading partner. This seemed bound to affect the US economy adversely. Conversely, some of the Latin American states began to enjoy greater prosperity. By 2011, for example, Brazil was viewed, along with India, as one of the world's great emerging economies, destined soon to rival the USA and China.

26.1 THE ERA OF US DOMINATION

(a) Problems facing the countries of Latin America

1 They were economically underdeveloped both industrially and agriculturally. Factory industries did exist (the Second World War had acted as a stimulus because manufactured goods from Europe and the USA were impossible to come by), but for all sorts of reasons, Latin American industry was still well below the level of industry in the developed countries of Europe, the USA and Japan. There was a shortage of capital, equipment and technical knowledge. Home markets were unpredictable because the vast majority of people were too poverty-stricken to provide enough purchasing power, and it was difficult to export because of competition from the advanced industrial nations. Many countries found themselves heavily dependent for exports on a limited range of products, sometimes even a single commodity. A fall in the world price of that commodity would be a major disaster. Chile relied on copper, Cuba on sugar and tobacco, and Bolivia on tin; during the 1950s, in fact, 80 per cent of all Bolivia's revenue came from tin exports. Agriculture remained backward because peasant labour was so plentiful and cheap that wealthy estate owners had no need to go to the trouble of modernizing. Peru, for example, was dominated by huge estates whose owners were all-powerful, and who ruled their peasants like feudal monarchs.

2 There was a massive rise in population mainly because of advances in medicine and hygiene and the refusal of the Roman Catholic Church to promote birth control. Peasants found their holdings were too small to support large families, but when they moved to the cities they found that jobs were scarce. Almost all the major cities were surrounded by improvised shanty towns (known as *favelas* in Brazil) that were without water, sewage disposal or electricity. The gap between rich and poor grew wider and little progress was made in eliminating poverty and illiteracy.

3 Latin American political systems were, for the most part, inadequate for dealing with such enormous problems. There was no tradition of democracy, except in Chile, and states were dominated by groups of wealthy landowners and run by military dictators (caudillos). After the Second World War democratic systems were introduced in some of the states. But when the newly elected governments tried to introduce reforms, they faced strong opposition from the landowners who were determined to protect their privileged positions. They were able to use the army either to block the reforms or to overthrow the reforming government. This happened in Guatemala (1950), Bolivia (1964), Brazil (1964), Argentina (1966) and Chile (1973).

4 Heavy investment by foreigners in industry and agriculture caused problems because much of the profit was taken out of the countries. Most of the oil in Bolivia and Venezuela, both potentially rich countries, was extracted by American-owned companies. The US Fruit Company was the biggest landowner in Guatemala, while Chilean copper mines and Cuban sugar plantations were also under US control.

(b) Solutions to the problems?

1 Several international organizations were set up to help: the Organization of American States (OAS), founded in 1948, included most of the Latin American countries and the USA. It aimed to foster inter-American co-operation and to settle disputes. The Central American Common Market (1960) had some success in reducing tariffs.

2 The United Nations helped by providing technical experts and holding conferences to discuss how underdeveloped nations might go about increasing exports.
3 The USA provided massive economic aid. President Kennedy started the 'Alliance for Progress' which aimed to pump billions of dollars into Latin America to enable economic and social reform to be carried out. However, this kind of aid did not always work out for the best, and sometimes it created extra problems. American motives were mixed: they hoped, by solving basic economic and social problems, to encourage the election of moderate reforming governments which would be popular enough to prevent communists from coming to power. Sometimes the aid was in the form of loans made on condition that a large proportion of the loan should be spent on buying US products. This did nothing to help the development of local industry and involved governments in large interest payments. Often, as with Castro's Cuba and Allende's Chile, aid would be cut short if a government unacceptable to the USA came to power. Only if the government changed would the aid be resumed. In this way the USA was able to exert political influence via economic control; on occasion, they supplied rebels with weapons to overthrow a reforming government (Guatemala, 1954), and even used 20,000 American troops to crush an attempted comeback by a reforming president (the Dominican Republic, 1965).

(c) The crisis of the 1980s

By the early 1980s it was clear that the problems of Latin America had not been solved. Two problems in particular – those of debt and finance – had reached crisis proportions. The trouble was that, under US domination, the countries of Latin America had been obliged to follow economic policies known as 'neo-liberalism'. This involved privatization, deregulation of finance, cuts in social spending and other austerity measures. Basically this was designed to make use of a country's resources in order to benefit a wealthy elite at home, foreign investors, big business and bankers, particularly those in the USA. This had forced Latin American governments to borrow massively from foreign banks, in order to develop their amenities and industries. Many of these banks were in the USA, and the borrowing was at its height from 1973 until 1982. In 1982 the seven largest US banks made 60 per cent of their profits from the interest on loans to Third World countries, as against only 2 per cent in 1970. With the doubling of American interest rates in the period 1979–81, many of the debtor nations could not even pay the interest, let alone repay the debts, and the amount of interest they failed to pay each year was added on to the existing debt. They were forced to borrow from new sources merely to keep up the interest payments on the original loans. If a country stepped out of line, the USA did not hesitate to intervene; for example in 1991 the democratically elected president of Haiti, Jean-Bertrand Aristide, was removed in a military coup backed by the CIA after only eight months in office. Aristide was a committed Roman Catholic, a former priest, who was strongly influenced by the ideals of the Church's liberation theology. This was a style of theology which accepted many of Marx's theories (though not his atheism!). It stressed the church's mission to the poor and oppressed, based on the fact that Jesus was considered as a sympathizer with, and a liberator of the poor and downtrodden. In 2004 Aristide was removed for the second time in a similar coup. Throughout Latin America there were large numbers of priests with left-wing views and some were even supporters of revolution. Inevitably this brought them into conflict with the authorities; many were arrested and some were killed. In 1980 Bishop Oscar Romera of El Salvador was murdered by US-backed paramilitaries.

By 1985 Latin America owed some $368 billion, and there was a constant drain of

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capital to the USA, leaving Latin America increasingly impoverished. By 1987, as export earnings steadily declined, the situation was approaching catastrophe. *Brazil,* one of the most prosperous states with its huge natural resources, had debts of over $100 million, and in February the government announced that it was suspending interest payments. *Mexico,* which owed almost as much, was considering the possibility of repudiating its debts. Fortunately it didn't quite come to that: the IMF and the World Bank, desperate to avoid an economic catastrophe, arranged credits amounting to several billion dollars for Brazil. The Mexican government secured an annual loan for the next 30 years from the IMF and was able to reschedule its debts. Similar arrangements helped other debtor countries to survive.

There is insufficient space to consider all the countries of Latin America, but a closer look at five of them – Brazil, Venezuela, Mexico, Guatemala and Nicaragua – will demonstrate the varied Latin American experience during this period of US domination.

26.2 SOUTH AMERICA: BRAZIL AND VENEZUELA

(a) Brazil

Brazil had gained its independence from Portugal in 1825. It was a monarchy until 1889, when it became a republic. Until 1930 the country was ruled mainly by military dictatorships, but none of them succeeded in establishing a stable system. There were economic, social and political problems which caused several revolutions and attempted coups. The country began to make genuine economic progress after 1930 when the army replaced the ultra-conservative government of wealthy landowners with the more progressive and liberal President Getulio Vargas. For the first time the government took over economic planning, and Vargas was especially keen to encourage industry. Thousands of extra jobs were created, especially in electrical and steel manufacture. He soon became popular and was able to stay in power right through the Second World War. However, by this time the army was turning against him. They were worried by his popularity with the working classes and felt that he had become too powerful. In fact, he had been acting as a dictator since 1937, and no elections had taken place. The army wanted a president whom they could control, and so in 1945 Vargas was forced to step down. The army faced a dilemma when he was re-elected in 1950 for a five-year term: should they prevent him from taking office or not? Fortunately the younger army officers favoured Vargas and in the end, he was allowed to return. He stayed in power until 1954. He tried to continue acting as a dictator and once again the army grew tired of him. They accused him of corruption and incompetence and asked him to resign. Instead, he committed suicide, claiming that his death was 'a sacrifice on behalf of the Brazilian workers'.

The election of 1955 was won by Juscelino Kubitschek, whose first major action was to increase the army's pay, thereby, he hoped, guaranteeing their support. He completed his term in office in 1961, but his presidency was a disappointment. His only memorable achievement was the building of a new capital, Brasilia, and that was arguably an extravagance the country could ill afford. The winner in the 1961 presidential election was Janio Quadros, but he resigned after only seven months and the vice-president, Julio Goulart, took over. He wanted to move Brazil gradually towards democracy and proposed to give more people the right to vote. He also planned to limit the amount of profit that large multinational companies could take out of the country; the government could then use the extra revenue to help improve social conditions for the masses. Worse still – as far as the USA was concerned – he opened diplomatic relations with the USSR, promised to nationalize Brazil's oil refineries, and opposed economic sanctions against Cuba.

All this was much too radical for the army and for the right, and tension between them

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and Goulart's supporters looked like developing into civil war. US president Lyndon Johnson told the American ambassador in Brazil that the USA must do everything possible to help overthrow 'this left-wing government'. Goulart was accused of being a communist, though by no stretch of the imagination could this be taken seriously; in fact he was a millionaire landowner and a devout Roman Catholic. However, in April 1964 he was removed in a military coup. Fortunately there was no civil war, but it emerged later that President Johnson had ordered US naval vessels, including an aircraft carrier and two destroyers, together with ammunition and fuel, to be made ready in case the Brazilian military needed assistance. Although well-intentioned, Goulart's policies left the country in economic difficulties. He had failed to attract sufficient foreign investment which had been discouraged by the USA; inflation increased rapidly, and economic growth was minimal.

For the next 20 years Brazil was ruled by the military. For the first few years their policy was one of harsh repression: the old political parties were banned, there was a strict press censorship, opponents were arrested and the jails soon filled with political prisoners; trade unionists and left-wing students were a favourite target and there were reports of widespread torture and violent treatment of prisoners. After 1974, when General Ernesto Geisel became president, repression was gradually relaxed and it was announced that the army would return the country to full democracy, albeit slowly. During the years of military dictatorship the government had great success with its economic policies, achieving what many described as an 'economic miracle'. Faced with massive inflation and a stagnating economy, they tackled the problems by borrowing extensively from abroad. Countries that had been unwilling to lend to the Goulart government were quite happy to do business with a strong right-wing regime which had eliminated communist influence. This stimulated economic growth so that the years 1968–74 were a boom period; the annual growth rate was 10 per cent and exports quadrupled. After 1974 the growth rate fell to around 5 per cent, mainly because Brazil was having to import more of its oil supplies, much of it from Iraq. By 1980 it seemed that the good times were over: Brazil had incurred huge foreign debts, there was a slump in export markets, there was a yawning gap between rich and poor and there was widespread unrest among the rural poor in the north east of the country. In an attempt to find substitute fuels, the government, which had its own supplies of uranium, turned to nuclear power and bought reactors from West Germany. But there was no immediate improvement and in provincial elections in 1982, the government suffered significant defeats.

Faced with escalating economic and social problems, the military decided this was an appropriate time to hand power over to civilians. In 1985 the presidential electoral college chose the 75-year-old Tancredo Neves as the first civilian president for over 20 years. Sadly, he was taken ill almost immediately and died before he could be sworn in. His deputy, Jose Sarney, took over and for the next four years struggled to stabilize the economy. In February 1987 the government announced that it was suspending interest payments, but the IMF came to the rescue with credits amounting to $41 million. Brazil was able to pay the interest on time, but Sarney's emergency policies caused hyper-inflation, and in the 1989 election he was defeated by Ferdinando Collor. In an attempt to stem the rocketing inflation he introduced even more stringent policies: the currency was devalued, government expenditure was reduced, bank accounts of over 50 000 cruzeiros (about £1300 US at that time) were frozen for 18 months. This was a disastrous move since it meant that the economy was deprived of some $80 billion at a time when it was most needed. The result was a wave of business failures and massive unemployment. In the midst of the chaos Collor was accused of corruption, impeached by the Senate and forced to resign at the end of 1992.

The 1994 election was won by a coalition of right-wing groups with Francesco Cardoso as president. He had produced a *Plano Real* designed to bring inflation under control. This involved large tax increases, wage reductions for public-service workers,

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and the privatization of many government enterprises. This had great success in lowering inflation from a thousand per cent when the plan was first put into action, to single figures by 1997. Overseas markets began to revive and there were marked increases in exports of agricultural produce and manufactured goods. Cardoso was re-elected president in 1998. Just as it seemed that Brazil had at last achieved some sort of stability, there was another crisis. Some of its foreign customers, including Russia and south-east Asia, reduced their imports from Brazil, government spending and borrowing were still much too high, and inflation began to rise again. Once more the IMF stepped in to help stabilize the currency with massive credits of $41 billion. There was considerable unrest among the working classes, many of whom were poverty-stricken, and there was an increase in crime and violence.

The year 2002 was when things began to change, with the election of the left-wing Luis Ignacio da Silva (popularly known as 'Lula') as president. He was re-elected in 2006 and remained in power until the end of 2010. It was during this period that Brazil at last began to fulfil its promise, so that by 2011 it was viewed as potentially one of the world's leading economies (see below).

(b) Venezuela

Venezuela is one of the wealthiest states of Latin America because of its oil resources. Until 1945, however, profits went to foreign oil companies (mainly American and British) or to the small group of wealthy people who ran the country via a military dictatorship. The great mass of the population received no benefit from this wealth and remained poor and illiterate. In 1945 Romulo Betancourt, the leader of a progressive left-wing party called *Acción Democrática,* was placed in power by a group of young army officers after fierce fighting in Caracas, the capital, had led to the overthrow of the military government. Betancourt introduced a new constitution which allowed full civil rights to all citizens. A programme of land reform was introduced, heavy taxes were placed on the foreign oil companies, and plans were prepared to exclude the army from politics. These reforms were bitterly opposed by foreign companies and by rich landowners, and in 1948 Betancourt was driven out of office by an army coup.

For the next ten years the country was under ruthless military dictatorship. Political parties and trade unions were banned, and a strict press censorship was imposed. On the other hand, with the removal of Betancourt the USA was once again prepared to invest in Venezuela. American dollars flowed in and some progress was made with the building of steel plants to exploit local iron-ore deposits. Iron and steel soon became Venezuela's most valuable export, but still very little of the country's wealth filtered down to the ordinary people. In 1957 Archbishop Blanco of Caracas publicly condemned the great wealth and corruption that was rife among the country's leaders, while the majority of Venezuelans lived in poverty and often subhuman conditions. In 1958 a general strike broke out and a section of the army removed the dictator Marcos Pérez Jiménez (1952–8). Democracy was restored and Betancourt was voted back into power.

Betancourt immediately raised Venezuela's share of oil revenues to 60 per cent, but this disappointed the growing communist party which had expected him to nationalize all foreign companies. However, he proceeded cautiously, not wanting to alienate the USA in case aid was stopped. Although measures were introduced to improve education and health, his popularity gradually waned, though he was able to complete his presidency, stepping down in 1964. Democracy survived, with the presidency alternating between *Acción Democrática* and the other main group, the Christian Social Party. Venezuela was now the main supplier of oil for the Central American states and to a lesser extent for the USA, and was doing well out of the great oil boom of the early 1970s. In 1976 President

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Carlos Andrés Pérez nationalized part of the oil industry and created a new state oil company known as PdVSA.

The country remained politically stable right through until the early 1980s; the government legalized the Communist Party and opened diplomatic relations with the USSR. But then there was a fall in world oil prices that adversely affected Venezuela's revenue. At the same time there were difficulties in maintaining the levels of its other main exports – iron and steel. In March 1985, President Lusinchi (*Acción Democrática),* who had been elected in 1983, complained about the 'obstinately protective policies' of industrialized nations, which 'obstruct our trade possibilities'. He was especially critical of the USA which had just announced that it would reduce imports of Venezuelan steel from 550 000 tonnes a year (about 85 per cent of its total steel exports) to 110 000 tonnes for the next five years – a disastrous blow for Venezuelan industry. By the early 1990s the country was falling into arrears with debt repayments, and the government was trying to cope by following IMF requirements: this involved reducing imports and government spending. At the same time unemployment was rising and inflation was running at not far short of 40 per cent. Throughout the period there had been very little improvement in social conditions; the early advances in education and health care had not been maintained and dire poverty was rife. There was growing discontent and riots and in 1992 Colonel Hugo Chávez, a young military officer, was so disgusted when the government sent troops into poor neighbourhoods to put down the protests that he organized a coup to overthrow the dictatorship. Although the coup failed, it brought Chávez to the public's attention and demonstrated the split in the ranks of the military.

Meanwhile the economic situation worsened and in 1994 half the country's banking system collapsed. In 1997 the government announced an expansion of gold and diamond mining in an attempt to reduce its reliance on oil. After another failed coup in 1994, Chávez decided to run for president in the 1998 election. Campaigning on a programme of increased social spending and trading agreements with Cuba, he won a convincing victory, as voters turned away from the two main parties.

26.3 MEXICO, GUATEMALA AND NICARAGUA

(a) Mexico

The Mexicans won their independence from Spain in 1821 and until 1877 they were ruled by an assortment of two emperors, several dictators and some presidents. Important events included the loss of Texas after a short war of independence in 1836. Large numbers of Americans had settled in the thinly populated northern area of Mexico, known as *Tejas.* Calling themselves Texans, they declared themselves an independent republic and defeated a Mexican army sent to suppress them. Texas became a state of the USA in 1845. Mexico was defeated again in a war with the USA (1846–8), which resulted in the loss of about one-third of Mexican territory, including the areas now known as California, New Mexico, Nevada, Utah and Arizona, together with parts of Wyoming and Colorado. However, the USA did pay Mexico $18 million and waived its debts.

From 1876 until 1910 the country was ruled, except for one short interlude, by a dictator, Porfirio Díaz. This was a period of relative stability: oil production, mining and manufacturing industries were developed, largely thanks to foreign investment, while education, health care and the country's infrastructure were improved. The problem was that most of the industry was owned by foreigners, and little of the wealth generated percolated down to the masses. When workers formed trade unions in an attempt to improve their conditions, they were quickly suppressed. Also Mexico had become uncomfortably dependent on the USA. In 1910 Díaz decided to stand for re-election, although he was 80 years old

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by that time. He was declared the winner by a huge majority, but the election was so blatantly fraudulent that a revolution broke out, forcing him to resign.

The following decade was extremely confused and the revolution became a civil war as revolutionaries and counter-revolutionaries fought to gain control. In 1916–17 the USA sent troops into northern Mexico against the revolutionaries, and a war between Mexico and the USA was only narrowly averted. After 1920 the party eventually known as the Institutional Revolutionary Party (PRI) gradually gained control. It was dominated by revolutionary and reformist politicians and its programme was based on economic reform designed to narrow the gap between rich and poor. The PRI remained in power until 2000. In 1938 President Lázaro Cárdenas (1934–40) nationalized the oil industry, much to the delight of the general public. However, this was not welcomed by the USA or the UK, both of which started a boycott of Mexican goods. This forced Mexico to sell oil to Nazi Germany and Fascist Italy, but after a compensation agreement was reached in November 1941, the USA was prepared to buy Mexican oil again. In fact after the USA entered the Second World War in December 1941, Mexican oil became vital. Following the sinking of some of their oil tankers by German submarines, the Mexicans joined the Allied side in 1942. An air-force squadron known as 'the Aztec Eagles' worked alongside the American Fifth Air Force in the liberation of the Philippines in 1945.

For 25 years following the end of the war, Mexico enjoyed a period of economic progress. The government invested in agriculture, fuel production, the railway system and primary education. A modest, but consistent annual growth rate averaging 3–4 per cent was achieved; Mexico became a major producer of petroleum – the sixth largest in the world; and exports of cotton, coffee and sugar were also important sources of revenue. By 1960 the number of workers employed in manufacturing industries had overtaken those working in agriculture. However, in the late 1960s the economy began to show signs of strain, partly because the government had accumulated massive external debts thanks to its extravagant borrowing. Confident that oil revenues would always be sufficient to cover interest payments, successive governments seemed to have abandoned restraint.

There was wide protest, and on 2 October 1968 troops fired on a demonstration by an estimated 10 000 students in Mexico City demanding a revolution and a return to democracy. Estimates of the numbers killed vary between 30 and 300. The government claimed that snipers among the demonstrators had fired at the army first. It later emerged that the snipers were actually members of the presidential guard who had been ordered to fire on the army in order to provoke them to attack the students. Coming as it did ten days before the Olympic Games were about to open in Mexico City, this caused grave concern about security; in response the USA sent riot control experts, weapons and ammunition to Mexico in case of further violence.

As the 1970s progressed Mexico's exports were badly hit by the world recession, leading to a shortage of capital for investment, to inflation and to difficulties in meeting interest repayments. Unemployment was rising and the gap between rich and poor continued to widen, until by 1980 it was estimated that about nine-tenths of Mexico's total wealth was owned by fewer than half a million people out of a total population of 85 million. In 1982 the government introduced desperate measures: the banks were nationalized, the currency was devalued by 70 per cent and there were drastic reductions in spending on public services. The new president, Miguel de la Madrid, elected in 1982, negotiated a deal with the IMF for a loan and a rescheduling of half the country's overseas debts of $96 billion. However, Mexico failed to fulfil the conditions attached, and in 1895 the IMF was preparing to cancel the agreement when Mexico City suffered a severe earthquake (measuring 8.1 on the Richter scale) which caused widespread damage and killed at least 7000 people. Clearly this was not the time to cause Mexico any further misery, and so the

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agreement went ahead. Meanwhile the PRI government was fast losing popularity and it came under further criticism for what was seen as its incompetent handling of the earthquake relief efforts. For the first time since the 1930s the party began to face challengers at elections.

Worse was to follow: in 1986 there was a sudden collapse in world oil prices and a consequent reduction in Mexico's oil revenues. There seemed a real possibility that Mexico would have to repudiate its debts. As President de la Madrid put it: 'We have reached the limit of being able to sustain this net transfer of resources to the rest of the world, which violates economic logic and is tremendously inequitable.' The more pessimistic economists were predicting the collapse of world-trading financial systems if Third World countries were to begin a mass repudiation of debts. In 1990 Mexico again had to appeal to the IMF, which saved the situation by promising relief of $3.6 billion dollars for the next 30 years, while the World Bank rescheduled its debts. The next president, Carlos Salinas (1988–94) reduced domestic spending and embarked on a policy of privatization; although this did nothing to solve the unemployment problem, it did help to bring inflation down to single figures and eliminated the budget deficit. Mexico joined the North American Free Trade Association (NAFTA), along with the USA and Canada, which came into force in January 1994. This removed tariffs on more than half of Mexico's exports to the USA and on about one-third of US exports to Mexico. All tariffs between the two countries were to be removed after 15 years. Opinions differ on whether or not this has been beneficial for Mexico. Certainly Mexican exports to the USA increased, and the country was opened up to US and Canadian investment. On the other hand, Mexican farmers suffered because imports of US agricultural produce, especially meat, increased substantially.

The year 1994 saw two shocking events which did nothing to enhance the reputation of the PRI government. First, on 1 January, there was an armed uprising in the southern province of Chiapas by the Zapatista Army of National Liberation (ZANL). Chiapas was one of the most deprived parts of Mexico; the majority of the population were poverty-stricken Mayan Indians who had no land of their own and were angered by the blatant corruption and incompetence of the ruling elite. Demanding land reform, full civil rights and genuine democracy, the Zapatistas (as they called themselves, after Emiliano Zapata, one of the leaders of the 1910 revolution) occupied several towns, setting fire to police stations and army barracks. Within a few days they were crushed by the Mexican army, suffering heavy casualties. Having decided to abandon violence, they concentrated on an internet campaign that brought them widespread publicity and growing support. Then in March 1994 the PRI candidate in the coming presidential election, Luis Donaldo Colosio, was shot dead at a political rally in Tijuana. Mario Aburto, a factory worker, was jailed for the murder, but many still believe that he was a scapegoat, and that the murder was arranged by the PRI itself. It was alleged that with his promise of drastic reforms of the corrupt political system, Colosio was breaking party ranks and therefore had to be eliminated.

Both these events frightened off investors at a time when outgoing President Salinas had just indulged in a year of high spending resulting in a huge budget deficit and inflation. This was made worse when members of his family helped themselves to enormous illicit payoffs. With falling oil prices compounding the problem, Mexico was heading for an economic crisis. The new president, Ernesto Zedillo (1994–2000), decided to devalue the peso. Within the space of one week in December 1994 the peso fell from 4 to the dollar to 7.2. With many private banks apparently on the verge of collapse, and some US banks involved in Mexico also threatened, Zedillo appealed to the IMF and the USA. US president Clinton, working with the IMF, arranged loans of around $50 billion. Economic collapse was averted and over the next six years there was a modest recovery. But the crisis had important results. In the words of Peter Calvocoressi:

The Mexican crisis called into question the ability of international finance to meet such a crisis and therewith the willingness of financiers worldwide to support Latin American governments pursuing economic policies dependent on foreign loans and investment. The collapse of the Mexican peso dismayed all Latin American countries, where economic growth was desperately needed for its own economic ends and as a prerequisite for political stability. In Mexico the gap between rich and poor widened, and insurrection became more widespread and better armed.

In fact by 2000, underneath the outward appearance of prosperity, about one-third of Mexico's population still lived below the poverty line. The PRI seemed to be in a state of stagnation and blocked all moves designed to lessen the gap between rich and poor. In the Congressional elections of 1997 the party lost control of Congress, gaining only 38 per cent of the vote. In the presidential election of 2000 the PRI candidate, Francisco Labastida, was opposed by Vicente Fox, representing the centre-right National Action Party (PAN). Fox won a comfortable victory with 43 per cent of the vote against Labastida's 36 per cent; single-party rule by the PRI had been brought to an end after 71 years.

(b) Guatemala

Situated on Mexico's southern border, Guatemala is one of the poorest states of Latin America. Its history during the twentieth century is an excellent illustration of US involvement. A Spanish colony since the mid-sixteenth century, Guatemala gained independence from Spain in 1821, andfor a short time it was part of a Mexican empire and then part of a new federal state known as the United Provinces of Central America. This broke up in 1840 when Guatemala became fully independent. Largely an agricultural state, its economy depended on exports of bananas and coffee. The population, of which about 40 per cent were Mayan Indians who did not speak Spanish, consisted mainly of landless peasants, and the country was dominated by a few wealthy landowners and the army. In the early twentieth century the USA became heavily involved in Guatemala in the form of the powerful United Fruit Company (UFC). Beginning in 1901 the UFC gradually increased its activities and investments in Guatemala until by the Second World War it controlled almost half the country's best agricultural land and was the majority share-owner in the railways and the electricity system, among other things. This meant that although this foreign involvement brought many positive developments, in the last resort the interests of the UFC came first. The classic example of this was that the UFC was reluctant to finance the building of new roads because this would reduce its profits from the railways.

In October 1944 dissatisfaction with this state of affairs reached a climax: during a general strike the long-serving military dictator, Jorge Ubico (1931–44), was forced to step down by a mixed uprising of anti-government army officers, students and liberal intellectuals. In 1945 democratic elections were held and the Christian Socialist, Juan José Arévalo, was elected president for five years. Much-needed reforms were introduced:

- Many foreign-owned estates were confiscated and the land redistributed to peasants.
- A minimum wage was introduced.
- Extensive building programmes were started, including new houses, hospitals and schools.
- Landowners were required to provide adequate housing for their farm labourers.
- The formation of political parties was allowed, and so was the formation of trade unions, although their powers were restricted.

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The next president, Jacobo Arbenz, was elected in a landslide victory in 1951. He continued Arévalo's reforms, going much further. There were new social welfare programmes and wage increases for workers. Uncultivated land was taken from large estates, including those of the UFC, to be redistributed among peasants; although compensation was offered, the UFC claimed that it was not enough. Then Arbenz took one step too far: he legalized the Communist Party. This was too much for the USA: all aid to Guatemala was immediately stopped, Arbenz was accused of being a communist, and his opponents were supplied with arms and trained in neighbouring Honduras and Nicaragua by American CIA agents. Early in1954 the USA introduced a resolution in the Organization of American States (OAS) declaring that communist domination of any state in the Western hemisphere posed a threat to the security of all member states. This was passed by 17 votes to one (Guatemala).

In June 1954 American-backed forces led by Colonel Castillo Armas invaded Guatemala from Honduras and Nicaragua, while American planes bombed Guatemala City. Although the official Guatemalan army took no part in the coup, neither did they attempt to defend Arbenz, who was forced to resign. Armas took over and became a military dictator; parliament was disbanded and leading communists were arrested. Armas was assassinated in 1957 and was replaced by another military dictator, Miguel Ydigoras. US aid was resumed and an uprising against Ydigoras was put down in 1960 with American help.

The Americans insisted on calling the overthrow of President Arbenz an 'anti-communist coup'. But there seems little doubt that the Eisenhower government overestimated the threat from communism in Guatemala. It was prepared to sacrifice the Arbenz reforming government even though it meant violating the principle of non-intervention and souring relations with the rest of Latin America. Anti-American feeling spread, and 'Yankee go home' became a common slogan throughout Latin America.

Years of military dictatorship followed the overthrow of President Arbenz, during which the opposition constantly demanded social and economic reform. For over 30 years the country was in a state of virtual civil war: left-wing groups resorted to guerrilla attacks and kidnappings and were opposed by right-wing vigilante groups; the government used death squads against people deemed to be communists. It was calculated that in four months (October 1979–January 1980) during the presidency of General Romero García, 3252 political murders had taken place. After the next election, said to have been won by a García nominee, General Guevara, a group of army officers declared that the result had been fixed, and in March 1982 they put General Ríos Montt in power. After little more than a year, in August 1983, another coup replaced Ríos Montt with yet another General, Óscar Mejía. Montt complained that the USA had put pressure on him to take action against Nicaragua, and that when he refused, they had engineered his removal in favour of somebody who would. Soon afterwards Mejíia did indeed announce that he saw the Sandinista government of Nicaragua as a threat to the whole of Central America (see below). He promised a return to civilian democracy and in 1985 elections were held for a legislative assembly. The Christian Democrats emerged as clear winners with 51 out of the 100 seats, and in December their leader, Cerezo Arévalo, was elected president for five years.

Arévalo managed to tread a narrow tightrope, trying to reconcile the guerrillas and vigilantes, while the army was a baleful background presence. To complicate matters further, the economy was in crisis, the treasury was empty, and his fear was that if his reforming policies went too far, he would be removed by US intervention. Arévalo completed his full term and was replaced in 1991 by Jorge Serrano. He had some success in reversing the economic downturn and decreasing inflation, but then in May 1993 he made the mistake of suspending the constitution and dissolving Congress and the Supreme Court. He claimed that this was part of a clampdown to reduce the amount of corruption in public

life; he also tried to remove civil liberties and muzzle the press. This caused an outcry from most sections of society, and the army forced him to resign. Congress reconvened and in June 1993 chose Ramiro de León, a popular civil rights leader, to complete the presidential term.

De León was keen to bring formal ending to the civil-war situation that had now dragged on for well over thirty years. The Roman Catholic Church helped the government and Congress to agree on a programme of constitutional reform which came into operation in August 1994. De León worked hard to bring about reconciliation and the United Nations became involved in the search for peace. But it was not until 1996 that the civil war was officially ended. President Álvaro Arzú of the National Advancement Party (PAN), who was elected in January 1996, had the distinction of signing a peace agreement with the main guerrilla group, Guatemalan National Revolutionary Unity (URNG). In February he had personal meetings in Mexico with the rebel leaders and a ceasefire from 20 March was agreed. In December 1996 a formal peace agreement was signed; this legalized the URNG and granted a partial amnesty to the various participants in the violence. The war was over at last, but not before some 200 000 people had been killed during those 36 years, well over half of whom were Mayan Indians, who were especially targeted because of their militancy. Although the fighting was officially over, there was inevitably a legacy of bitterness and mistrust. The congressional and presidential elections of November and December 1999 were won by the Guatemalan Republican Front (FRG), and the new president, Alfonso Portillo, faced daunting problems including a high crime rate, continued violence and corruption, and economic challenges.

(c) Nicaragua

Like Guatemala, Nicaragua was a Spanish colony from the mid-sixteenth century until it became independent in 1821; then it was part of the Mexican empire for a short time and after that it became a member of the United Provinces of Central America until 1840, when it achieved full independence. The country had a disturbed history: politically unstable, punctuated by periods of ruthless military dictatorship and plagued by foreign intervention, especially from the USA. For the remainder of the nineteenth century internal politics were dominated by the power struggle between liberals, whose main power base was in León, and the conservatives, based in Granada. The two parties alternated in power – liberals for a short period in the 1850s, conservatives from 1860 until 1993, and liberals from 1993 until 1909.

The president during this last period was José Santos Zelaya, who was responsible for some important changes. There were great improvements in education, transport (new railways were built) and communications; coffee production expanded and exports increased, and the country enjoyed a modest prosperity. He also began the building of a new and neutral capital city – Managua. This helped to reduce the long rivalry and feuding between León and Granada and between liberals and conservatives. Unfortunately Zelaya had several faults: he was violent and corrupt, and developed delusions of further grandeur. He had many of his conservative opponents arrested, tortured and executed, and he and his associates helped themselves shamelessly to the state's assets – selling privileges and concessions to foreign interests and increasing taxes, but keeping the extra revenue for themselves. And finally he had visions of a united states of Central America, with himself as president! To further this ambition he stirred up unrest in other states. In 1906 for example, his troops invaded Guatemala in an attempt to overthrow the government. When this failed he turned to Honduras and supported a rebellion there; when that failed, his troops invaded Honduras, and with help from the army of El Salvador, defeated the Hondurans and occupied the capital, Tegucigalpa. By 1909 most Nicaraguans had had enough of

Zelaya; the conservatives had hated him for years, and even his own liberal supporters had turned against him, disgusted at the corruption and the meddling in the internal affairs of other states. The USA saw him as a destabilizing influence in the region and felt that their own interests were threatened.

It was a liberal, General Juan Estrada, who decided the time had come to remove Zelaya. He organized an uprising and was supported by the USA which sent warships and marines in case the coup failed. Zelaya decided to beat a hasty retreat to Mexico, having thoughtfully emptied the treasury before leaving. However, the power struggle between liberals and conservatives broke out again, and in 1912 US marines were sent in to prop up the conservative government and restore order. They stayed until 1925, but as soon as they left violence broke out again and after only a few months US forces returned. In 1927 the Somoza family came to power with the approval of the USA and the situation gradually stabilized, partly because American troops stayed until 1933.

After that the Somoza family ruled Nicaragua with an iron fist until 1979, supported by the USA. Political opponents were exiled and each of the Somozas amassed a large fortune. On three occasions the USA was able to use Nicaraguan territory and troops for attacks on other Latin American governments that it didn't approve of – Guatemala (1954), Cuba (1961) and the Dominican Republic (1965). The last of the Somazas, Anastasio, was so blatantly corrupt that he even became an embarrassment to the USA. President Carter urged him to reform and pay more attention to human rights. This had little effect and in 1979 he was driven out by the Sandinista National Liberation Front, named after Augusto Sandinista, who had led an unsuccessful revolution in 1933 and was later murdered on the orders of Somoza. The Sandinistas had widespread support among ordinary people and from a section of the Roman Catholic Church which was highly critical of the excesses of capitalism.

The new Sandinista government immediately introduced a programme of long overdue reform: a redistribution of 5 million acres of land, including some confiscated Somoza property, to about 100,000 families, a literacy drive and health improvements which eliminated polio and reduced other diseases. There were other social and economic reforms, and in 1985 Oxfam reported that the efforts of the government and their commitment to improving the conditions of their people were exceptional. Although the Sandinistas allowed a mixed economy of state and privately owned business, the US Reagan administration which took office in 1981 saw them as dangerous communists, especially when they formed close links with Cuba. The USA did everything it could to undermine them and bring them down. All aid was stopped; the US began, and encouraged other states to join, a trade blockade and a credit squeeze against Nicaragua; and they financed the Nicaraguan Democratic Force (FDN), known as the Contras. The Contras waged a damaging guerrilla campaign, blowing up bridges, schools and health clinics and burning crops. After they had mined three harbours, the International Court of Justice condemned the American CIA's backing of the Contras and ordered them to pay compensation for damages caused; the USA rejected the ruling and refused to pay compensation.

US policy was not popular with most of Nicaragua's neighbours. A meeting of the Latin American parliament (which had been founded in 1968) was held in Guatemala City in April 1986, when 16 out of 18 members voted in favour of a motion condemning the US attitude (Honduras and El Salvador were the exceptions). The policy was controversial in the USA itself, and in March 1987, following the Irangate Scandal (see Section 23.5(b)), Congress voted that aid to the Contras should be stopped.

This provided a ray of hope for embattled Nicaragua and her president, Daniel Ortega, who had been elected in 1984 for six years. In 1987 President Óscar Arias of Costa Rica persuaded all the Central American presidents to support his peace plan for the region, an achievement that won him the Nobel Peace Prize. However, the plan proved difficult to carry out, mainly because the Reagan administration was still doing its utmost to

destabilize Nicaragua. Under US pressure, both Honduras and El Salvador declined to co-operate with the peace plan. Ortega's co-operation with Castro's Cuba outraged the Americans, and during the 1990 election campaign, the Bush administration threatened that violence would continue if the Sandinistas won the election. Even so, it was a surprise when the National Opposition Union candidate, Violeta Barrios de Chamorro, became the first female president to be elected in Latin America. Ortega and the Sandinistas accepted the result and she was able to serve her six-year term. Her main achievement was to disarm some of the guerrilla groups that had been terrorising the country for years, and most of the fighting ceased. Things became more stable and some of the Sandinista social reforms were allowed to stay. But the economy was in total ruins and government debts were astronomical. Nevertheless, Ortega was again defeated in the 1996 election, this time by Arnoldo Alemán, and in the 2001 election by the National Liberal Party candidate (PLC), Enrique Bolanos.

At the turn of the century the country was still in dire straits. In 1998 there was a devastating hurricane which killed 9000 people, left around 2 million homeless and caused damage amounting to $10 billion. In 2002 former president Alemán was charged with corruption and embezzlement and later sentenced to 20 years' imprisonment. The situation was so bad that in 2004 the World Bank and the IMFI waived $4.5 billion of Nicaragua's debts. In the elections of November 2006 Daniel Ortega made a comeback: he won the presidency with 62 per cent of the vote, and the Sandinistas had a comfortable majority in parliament. But as they took office in January 2007, they faced a challenging prospect – Nicaragua had the distinction of being the poorest country in the Western hemisphere. When he stood for election for a third term in November 2011, Ortega won a landslide victory.

26.4 THE CHALLENGE TO US DOMINATION

Towards the end of the twentieth century, some Latin American states began to resist US control. As genuine democracy spread, leftish political groups organized campaigns in favour of social and economic reform. People were prepared to vote for them because their programmes were attractive: the neo-liberal-style policies favoured by the USA should be abandoned; foreign companies should be required to hand over more of their profits to the state to help tackle the poverty and inequality which were still rife throughout Latin America. Since the Cold War was over and the USSR had ceased to exist, the USA could no longer get rid of left-leaning governments on the grounds that they were aiming to form alliances with the communist bloc. The first major challenge to US influence came in 1998 when Hugo Chávez won the **Venezuelan** presidential election with 56 per cent of the vote on a programme of increased social spending and an attack on poverty.

Similar trends followed in some other important states: in 2002 the left-wing Luiz Inácio da Silva (popularly known as 'Lula') won the **Brazilian** presidential election with a programme similar to that of Hugo Chávez. The following year **Argentina** followed suit with the election of Nestor Kirschner, and in **Chile i**n January 2005 the centre-left Michele Bachelet was elected – Chile's first woman president. Like-minded presidents were elected in **Bolivia** and **Ecuador** in 2006, and in the same year Daniel Ortega staged a comeback when he became president of **Nicaragua** for the second time after a gap of 16 years. Meanwhile in **Mexico** the trend seemed to be in the opposite direction: after 71 years of rule by nominally left-wing governments, voters turned to a moderately conservative party for their next president – Vicente Fox. A brief look at each of these countries should reveal how much, or how little progress has been made towards modernization.

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(a) Venezuela

Although Venezuela was rich in oil, when Hugo Chávez became president in 1998 the country was facing economic problems, mainly because of a fall in world oil prices. His general aim was to free Venezuela from US influence and create a network of countries sympathetic to his project. He didn't try to abandon capitalism, but simply moved away from the type of neo-liberal capitalism favoured by the USA and other leaders, such as Margaret Thatcher in the UK. From the beginning he spoke out publicly against the USA, ending Venezuela's long-standing military ties with the USA, and giving economic support to Cuba. This provided a lifeline for the beleaguered Cuba, which had lost its main supporter when the USSR collapsed.

One of Chávez's earliest moves was to tighten control over the PdVSA, the state oil company set up in the 1970s. In recent years the company had been contributing less and less to the state treasury, while managers paid themselves vastly inflated salaries. This was immediately put right, and a Hydrocarbons Law introduced, making it illegal for any private company to own more than 50 per cent of the shares in joint oil ventures with the state. All of this upset many traditional interests – sections of the army, oil executives and right-wingers in general. An alliance of these groups, partly financed by the USA, staged street demonstrations demanding the resignation of Chávez. A group of hostile officers kidnapped him, but he was rescued by officers loyal to him, and amid massive pro- Chávez street demonstrations, he was enabled to stay in power. This proved to be the first serious blow against US influence in South America and the beginning of a new era. Large parts of the economy were taken into state control: the oil industry was fully nationalized in 2007, followed by the electricity supply and telecommunications. In 2011 the gold industry followed.

By this time Chávez had started moving much of Venezuela's gold reserves out of Western banks and into countries he counts as allies – Russia, China and Brazil. As the debt crisis in Europe worsened, more reserves were transferred to China, a move welcomed by Beijing, which had invested heavily in Venezuela. The main economic weakness was that Venezuela, the world's fifth largest oil exporter, was still overdependent on oil production, with around 90 per cent of revenue from all exports coming from oil. It meant that whenever world oil prices fell, the economy suffered. In 2009 for example, the economy shrank by around 3 per cent because of the world recession.

Another aim of the Chávez government was to help the poverty-stricken masses by spreading some of the country's wealth more widely. According to UN statistics, in 1998 when Chávez came to power, 54 per cent of the population were living below the poverty line. He introduced a social welfare programme known as the Bolivar Plan 2000 (called after the nineteenth-century revolutionary leader and founding father of Venezuela). There were plans to improve the public health-care system, housing projects, and loans to enable people to start up small businesses. Thousands of co-operatives owned by the workers were set up with government help. Extra cash was made available to tackle the AIDS epidemic. Great progress was made in securing equal rights for women, including a new rule for political parties: at least 50 per cent of election candidates had to be female. In 2008 the government announced a $111 million plan to upgrade dozens of hospitals.

There is no doubt that Chávez and his Bolivarian socialism have brought important changes to Venezuela. He has switched the country from being almost a colony of the USA, asserting its independence, and has focused on trade and co-operation agreements with other states in the region, in order to promote his vision of Latin American integration. His attempts to reduce poverty have had some success: UN statistics show that 54 per cent of the population lived in poverty in 1998 compared to 28 per cent in 2008. Clearly there is still some way to go, but these statistics suggest that if similar policies were to be continued for another ten years (until 2018), serious poverty might well have been all but eliminated. However, by 2012 the signs were not auspicious. By this time Chávez had

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alienated most of the business class, the Roman Catholic Church, and left-wingers who felt that he had become too authoritarian. In 2009 the Church and Human Rights Watch accused him of 'creating a climate of fear'. Chávez was due to stand for re-election in October 2012, but local elections in 2010 and 2011 showed a fall in his socialist party vote. He also had health problems, having been recently diagnosed with cancer. However, he was still seen as a hero by the majority of the working class; in spite of all these problems, plus the efforts of the USA to discredit him, he won the 2012 election comfortably.

(b) Brazil

In 2002 the voters of Brazil, sick of corrupt party politics and neo-liberal economic policies, elected as president 'Lula' da Silva of the Workers' Party. He had promised to narrow the enormous gap between rich and poor by expanding education and redistributing land, and to introduce social welfare programmes. In office he turned out to be much more moderate than he had sounded during the election campaign. Though a socialist, he felt that the economic crisis was serious enough to require non-socialist solutions. He went along with the IMF conditions, reducing public spending in return for the $41 billion credit needed to stabilize the currency. On the other hand he did introduce widespread anti-poverty programmes, and increased the minimum wage by 25 per cent. His *Bolsa Familia* programme paid modest monthly grants to poor families provided they sent their children to school and had their health checked regularly. It was estimated that by 2008 *Bolsa Familia* had helped some 7.5 million families.

Lula was not afraid to stand up to the USA if he felt strongly enough. He opposed George Bush's Free Trade Area of the Americas (FTAA) and got away with it, probably because the USA was preoccupied with the Iraq War. Instead, a trade agreement with China did much to steady the economy, and reforms were made to pensions and taxation systems, as well as a drive for administrative efficiency. New policies were devised to encourage industry, trade and exports and foreign investors were encouraged. Inflation and government debt were brought under control. This was a considerable achievement and Lula was re-elected in 2006. Brazil received an enormous boost in 2007 when the Tupi undersea oilfield was discovered, taking it into the top league of oil producers and removing the need to import oil. The surge in exports, the fall in unemployment and the general economic expansion, together with the welfare programmes, have helped to lift millions of people out of poverty, so that for the first time probably a majority of the population of over 190 million can be deemed middle-class.

The constitution did not allow Lula da Silva to stand for a third term in office, but the Workers' Party continued in power with the election of Dilma Rousseff who, in January 2011, became the first woman president of Brazil. A strong advocate of human rights, social inclusion and equal treatment for women, she had served as a minister in the da Silva cabinet. She continued Lula's policies; at the end of 2011 Brazil's economy was ranked sixth largest in the world, and experts predicted that by the end of 2012 it would probably have risen to fifth place. Since the economic crisis at the end of the twentieth century the country had made remarkable progress. It now had arguably the most advanced industrial sector in the whole of Latin America, responsible for about one-third of total GDP. Brazil is a major supplier of minerals such as iron ore, tin, manganese, uranium, copper, zinc and gold. Manufactures include motor vehicles and spare parts, aeroplanes, textiles, steel, various types of machinery, computers and petrochemicals. Agriculture is important – Brazil is the world's largest producer of sugarcane, coffee, tropical fruits and concentrated orange juice. Although agricultural produce makes up only about 7 per cent of GDP, it amounts to over 30 per cent of exports. Brazil is also active in the realms of science and technology, including agricultural research and deep-sea oil production.

Although relations with the USA are generally good, there has been a change in the nature of their relationship. Brazil was once treated very much as a subordinate; now they deal with each other almost as equals. As the Brazilian economy climbs higher in the international league table, they could easily become serious rivals in the future.

(c) Mexico

The new National Action Party (PAN) president Vicente Fox had been elected on a programme of ending government corruption and improving the economy. As a centre-right politician he was happy to have a close relationship with the USA and worked hard to improve and expand Mexico's trading partnership with the USA, and they co-operated in a campaign against drug trafficking. However, when Fox called for the frontier between Mexico and the USA to be opened so that Mexican migrant workers could move freely into the USA, the Americans rejected the idea and accused Fox of encouraging illegal immigration. On the other hand, Fox's left-wing opponents criticized him for aligning Mexico too closely with the USA. In 2002 when he proposed to visit Washington, the Mexican senate blocked the plan. Unfortunately for Fox, PAN did not have a majority in the legislature, which rejected many of his reform proposals. Farmers staged widespread protests because the government did nothing to solve agricultural problems caused by Mexico's membership of the North American Free Trade Association (NAFTA), particularly the huge increase in imports of American produce, especially meat. Fox's presidency was something of a disappointment, although he was personally popular.

The constitution did not permit a second term; the presidential election of 2006 was won by the PAN candidate, Felipe Calderón, by the narrowest of margins. His election promises included campaigns against corruption, poverty and tax evasion; and infrastructure improvements – new roads, railways, airports, dams and bridges, all of which would help to solve the unemployment problem. But again there were economic problems: the economy was heavily dependent on the cash that millions of migrant workers sent home from the USA. In 2008 the world credit crisis (see Section 27.7) caused a downturn in the US economy and in global demand generally, and this had repercussions on Mexico, which was also hard hit, suffering arguably the worst slump since the 1930s. However, a recovery was soon under way. Foreign investment began to flood in once more, so that during the first half of 2010 there was a 30 per cent increase from a year earlier. In 2012 Mexico had the second largest economy in Latin America, with about a third of its revenue coming from oil, much of which is sold to the USA. Other exports include machinery and transport equipment, various foodstuffs and live animals.

One of the great issues in Mexico and in much of Latin America is the drug-trafficking problem. Powerful cartels control the trafficking of drugs out of Latin America into the USA, a business which generates around a staggering £9 million. One of President Calderón's first actions was to declare war on drugs and deploy the army against the drug gangs. Since December 2006 an estimated 35 000 people have been killed in Mexico in drug-related violence and the country has one of the highest rates of kidnapping in the world. The president claims that his fight against the cartels is working, but still the struggle goes on. In April 2012 a summit meeting of Latin American leaders was held in Cartagena, Colombia, at which Guatemalan president Carlos Molina said that the system of merely making drugs illegal had failed, and he called for an alternative system. The summit was divided between those who advocated complete legalization of drugs and those who thought that this would be irresponsible. In Mexico critics of the president claimed that his policy of using the army against the cartels had failed and had been so expensive that more important projects, such as improving the nation's infrastructure, had been neglected. Although Mexico had the second largest economy in Latin America, there

was still a long way to go before it could claim to be a genuinely 'modern' state. According to a BBC report in January 2012:

> Mexico is a nation where affluence, poverty, natural splendour and urban blight rub shoulders ... . But prosperity remains a dream for many Mexicans and the socio-economic gap remains wide. Rural areas are often neglected and huge shanty-towns ring the cities.

(d) Argentina

Argentina was ruled by a military junta from 1976 until 1983, when the country returned to democracy. The junta was responsible for thousands of deaths in what became known as the 'the dirty war' to restore order and eliminate opponents. A human rights commission charged the junta with 2300 political murders, over 10 000 political arrests and the disappearance of up to 30 000 people. In an attempt to win some popularity the junta made the mistake of invading the Malvinas Islands, held by the UK as the Falkland Islands (April 1982). Britain won an unexpected victory, recapturing the islands, and leaving Argentina with an unprecedentedly high foreign debt and inflation of around 900 per cent. There was a return to democracy for the presidential election of 1983, but the economy continued in crisis. By 1991 there were riots in protest at high food prices and unemployment. President Carlos Menem, who took office in 1991, resorted to classic neo-liberal policies: protectionist trade and business regulations were removed, strict austerity measures were introduced and there was a wave of privatizations of state-owned industries. It was all to no avail – in September 1998 Argentina moved into the worst recession for years. Ferdinando de la Rúa was elected president in 1999 and introduced more austerity measures. But the recession continued and the IMF came to the rescue twice in 2001. In November of that year the economy seemed on the verge of total collapse and there was a financial panic; in December there was serious rioting in the capital, Buenos Aires, forcing the president to resign.

After a chaotic interval, Nestor Kirchner was elected president and came to power in 2003. An admirer of Hugo Chávez and his policies in Venezuela, Kirchner was determined to make a break with the past and reject neo-liberal economics. In his public pronouncements he savagely criticized the IMF and foreign investors. He abandoned what he called 'automatic alignment' with the USA in favour of closer ties with other Latin American countries, especially Venezuela, and with Mercosur, a sort of common market and customs union set up in 1991 to encourage free trade and political co-operation. Its original members were Argentina, Brazil, Uruguay and Paraguay; Venezuela joined in 2006. Kirchner raised wages and pensions for those most in need, set up a new state-run oil company and signed energy agreements and various other trade agreements with Venezuela. He encouraged greater government involvement in the energy sector, though he stopped short of renationalizing the country's main oil company, YPF, which had been sold off to a Spanish company, Repsol, during Carlos Menem's presidency. The economy soon showed signs of recovery: Venezuela began to import cattle and agricultural machinery from Argentina, and by 2008 Argentina's exports to Venezuela had quadrupled since Kirchner came to power. The economy showed an impressive annual growth rate of about 8 per cent and in January 2006 it was announced that Argentina had paid off all remaining debts to the IMF. Kirchner also won popularity when the laws granting pardon to those accused of atrocities during the 'dirty war' were cancelled, so that in 2006 many military and police personnel who thought they were safe were arrested and put on trial. Kirchner decided not to stand for re-election in 2007, and his wife Cristina Fernández de Kirchner was elected instead. She broadly continued her husband's policies, and against

the predictions of many neo-liberal economists, Argentina's boom continued. The economy maintained its 8 per cent annual growth rate, and by the time of the next election in October 2011, the poverty rate had been halved, employment had risen to a record high, and a lucrative export market had been developed in China. It was no surprise when President Fernández was easily re-elected for a second term, winning by the largest margin since democracy had been restored in 1983. Relations with the UK were threatened by the re-emergence of the Falklands question when it was announced in September 2011 that a British company would begin drilling to exploit the Falkland's offshore oil reserves in 2016.

(e) Chile

Chile had the first democratically chosen Marxist/socialist government ever, when Salvador Allende was elected president in 1970. However, he was soon overthrown and killed in a military coup backed by the CIA. General Augusto Pinochet ruled Chile for the next 17 years, and though he did much to improve Chile's economy, it was a period of brutal repression (for full details see Section 8.4). Following the return to democracy in 1990, Chile was ruled by presidents from the centre-left Coalition of Parties for Democracy (CPD). There were two Christian Democrats: Ricardo Aylwin (1990–4) and Eduardo Frei (1994–2000), son of the earlier President Eduardo Frei. Next came two socialists: Ricardo Lagos (2000–6) and then Michelle Bachelet (2006–10), Chile's first woman president. She was a former paediatrician and her father had been a victim of the Pinochet regime. Faced almost immediately with a strike by thousands of students demanding educational reforms, she calmed the situation and promised to put things right.

At first she continued her predecessor's economic policies and increased social spending. It was during her presidency that Chile began to move out of the period of transition from military dictatorship to genuine democracy. Clearly the classic neo-liberal economic policies were not sufficient to bring full recovery, and so the government broke the neo-conservative rules with a dose of state intervention: for example, the world's largest copper producer, Codelco, was taken into state hands and government control of capital was introduced, allowing the president to finance new social policies. As the next election (December 2009) approached, Bachelet's popularity level, which had dropped to around 40 per cent during the world debt crisis in 2008, had risen to 84 per cent. Unfortunately for Bachelet and the CPD, the constitution does not allow presidents to serve for two consecutive terms, and consequently a former president, Eduardo Frei, was endorsed as the CPD candidate. The main right-wing opponent was Sebastián Piñera, whom Bachelet had defeated in 2006. It was Piñera who won the presidency in the second round of voting in January 2010. His victory surprised many observers, bearing in mind the popularity of President Bachelet. However, the explanation for the CPD defeat was probably that Eduardo Frei failed to generate any enthusiasm and was seen as representing old-style politics. Piñera, on the other hand, concentrated his campaign on the need for greater government efficiency. Shortly after the January run-off, Chile was hit by a devastating earthquake that killed 500 people, left around a million homeless and caused damage estimated at between $15 and 30 billion. Unfortunately the new president was faced with the problem of dealing with the aftermath of the catastrophe.

(f) Bolivia

One of the poorest states in Latin America, after gaining independence from Spain in 1825, Bolivia had a long history of instability and military dictatorships. Since the Second

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World War the Bolivian economy was controlled by the USA, which, among other things, processed all Bolivia's tin exports. In the 1950s, when the country was trying to become more self-sufficient in spite of its limited available capital, the USA insisted that this capital should be used to pay the country's foreign debts rather than to finance its own developments designed to increase revenue. In 1964 the military seized power and in 1967 the army, with the help of US advisers, easily defeated a guerrilla campaign led by Ernesto 'Che' Guevara, who was captured and murdered on CIA orders. The army stayed in control until 1982 when Bolivia returned to democracy, with a string of presidents who took care not to antagonize the USA. In 1997 Hugo Banzer, a former general and dictator-turned democrat, was elected president. He made important progress in eliminating coca production and drug trafficking, much to the delight of the USA.

The near-eradication of coca farming by 2001 was an extremely controversial issue that was to have profound effects on Bolivia's future. Coca had been an important crop in Bolivia for around 4000 years and as Nikolas Kozloff explains, it has several legal uses:

> In Bolivia and the Andes coca leaf is legally used as an infusion to make tea. The leaf is usually chewed with a bitter wood-ash paste to bring out the stimulant properties similar to caffeine or nicotine. In the Andes, visitors are commonly offered coca tea to combat altitude sickness, which can cause headache or vertigo. Coca is also used for cosmetic products and toothpaste. Outside the region, however, coca is classified as a prohibited drug. In order to convert coca leaf into cocaine, it must be combined with other ingredients and subjected to a complex chemical process.

Thousands of coca farmers became unemployed and were plunged into poverty; the coca growers' union joined with other trade unions and social interest groups to form an organization called MAS (Movement Towards Socialism), which campaigned on a platform of decriminalizing coca and nationalizing the country's natural resources. The call for nationalization of resources was a response to the unpopular privatization of water resources by foreign companies, which led to a doubling of water prices.

In December 2005 the MAS candidate, Juan Evo Morales, was elected president. An Aymara Indian, he was the first Bolivian president to come from the country's ethnic majority. He had been a leader of the coca growers' federation and was determined to do his utmost to get coca decriminalized. In September 2006 he told the UN General Assembly in New York that coca had therapeutic uses and should not be criminalized. While agreeing that it was necessary to fight drug smuggling, he insisted that prohibition of pure coca leaf was 'an historic injustice … coca does not harm human health'. He added that criminalizing coca was simply a strategy by the USA and Europe to recolonize the Andes region. Clearly Hugo Chávez had found a courageous ally in his anti-US stand. Morales soon signed trade agreements with Venezuela and refused to have anything to do with the US-sponsored American Free Trade Area, which he described as 'an agreement to legalize the colonization of the Americas'. He added that Bolivia, Venezuela and Cuba might form 'an axis of good' in contrast to the 'axis of evil' that included the USA and its allies. Further anti-neo-liberal moves included signing new contracts with the private gas companies designed to bring in more revenue for the government; and a partial nationalization of the hydrocarbons industry. According to Noam Chomsky:

> Since the election of Morales in 2005, Bolivia's economic performance has been quite impressive. A Center for Economic and Policy Research (CEPR) study found that in the four years since Morales took office, 'economic growth has been higher than at any time during the last 30 years, averaging 4.9 percent annually. Projected GDP growth for 2009 is the highest in the hemisphere and follows its peak growth rate in 2008, along with "several programs targeted at the poorest Bolivians".

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Morales was re-elected for a second term in 2009 with an increased majority, and MAS won a two-thirds majority in both houses of Congress.

(g) Ecuador

Ecuador is another of the poorest states in Latin America. It became fully independent in 1830 and was ruled by centre-right presidents until 1895, when a revolution led to half a century of more liberal governments. The army seized power in 1972, but giving way to popular demand, they returned the country to democracy in 1979. However, progress towards modernization was disappointing; successive governments failed to deliver on their promises of land reform, an end to unemployment and the provision of social services. In 1998 a fall in the world price of oil, Ecuador's main export, caused an economic crisis; inflation rose to over 40 per cent, and the poverty rate rocketed to around 70 per cent. Although the economy recovered quickly, the government became increasingly unpopular, because of its strict austerity measures together with blatant corruption among leading politicians. In 2006 there were huge protest demonstrations against a proposed free-trade agreement with the USA which was widely seen as a ploy to tighten US control over Ecuador's economy. The presidential election of November 2006 was won by the left-wing economist, Rafael Correa.

It soon became clear that the new president intended to follow the example of Chávez and Morales. He announced that 'the long neo-liberal night' had come to an end and promised an economic revolution to renegotiate the foreign debt and channel as much money as possible into health and education. Correa's first term was due to end in January 2011, but a new constitution was proposed which would weaken Congress, strengthen the powers of the president and allow him to stand for two further terms. His critics accused him of trying to make himself into a dictator, but in a referendum held in September 2008, the new constitution was approved by 64 per cent of voters. This now required a general election in April 2009. Correa was easily re-elected for a second term to last until August 2013, which could be extended to 2017 if he were to be elected again. In 2010 legislation was passed requiring foreign oil companies to renegotiate their contracts so that more of the profits went to the government, to be used in the campaign against poverty and its causes. Companies were warned that if they refused, they would be nationalized and forced out of the country.

These policies alienated various right-wing groups and in September 2010, after President Correa took the dangerous step of ending bonuses and other benefits for the police force, protest demonstrations broke out in which the police were heavily involved. Road blocks were set up and protesters invaded the National Assembly and the state-run TV station. When Correa tried to talk with police representatives, he was kidnapped and held hostage. It looked as though a coup was being attempted, and the president declared a state of emergency and called on the army to intervene. During the night an army unit rescued him from a hospital where he was being held; after fighting between the army and the police, order was restored and Correa continued in office.

By 2012 there were signs that Correa's social policies were working: both unemployment and poverty levels had fallen, and there had been vastly increased expenditure on roads, hospitals and schools. In 2011 Ecuador's economy grew by 7.8 per cent, helped by higher oil prices. Not surprisingly the president's popularity with the poor increased considerably, but the middle classes complained about rising prices and rising taxation, while human-rights groups accused him of making himself too powerful. Although the opposition was divided and relatively small in number, Correa had to contend with a largely hostile media. However, it was widely expected that he would be re-elected, if he decided to stand again in August 2013. Ecuador gained worldwide attention in the summer

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of 2012 when President Correa granted political asylum to Julian Assange, the founder of WikiLeaks, which publishes classified information, including US military and diplomatic documents. He was wanted for questioning in Sweden in relation to a rape investigation, and there was a strong possibility that he could be prosecuted in the USA over the WikiLeaks publication of confidential documents. The British government wanted to hand him over to Sweden, but from June 2012, with the situation locked in stalemate, Assange was living under diplomatic protection in the Ecuadorian embassy in London.

(h) Nicaragua

Taking office in January 2007, President Ortega had become less 'revolutionary' and toned down his anti-capitalist stand during his years in opposition since 1990. He claimed that he was now motivated by Christian principles rather than by Marxism. There were allegations of fraud during the election, and both the USA and the EU suspended their aid programmes to Nicaragua. Nevertheless, Ortega introduced new schemes to improve healthcare, social services, education (including a system of scholarships for poor students) and housing. Progress was slow – in 2011, towards the end of his term in office, the country was still the poorest in Latin America, with 46 per cent of the population living below the poverty line. On the other hand, private businesses had been allowed to continue without state interference, and the government could claim with some justification that the mixed economy had produced a period of sustained economic growth. According to Robin Yapp, writing in the *Telegraph* (7 October 2011), Nicaragua was 'helped by cheap oil from Hugo Chávez's Venezuela, which has helped to prop up social schemes like subsidized housing. Ortega has also been able to attract foreign investors who see Nicaragua as a safe haven compared to neighbouring Honduras or El Salvador which have the world's highest murder rates.'

Ortega has attracted considerable criticism from many sections of society. Some of his former left-wing supporters have left the party, accusing him of kowtowing to the neo-liberals simply in order to stay in power. Democrats claim that he is well on the way towards becoming a dictator like the Somozas. He certainly got the Supreme Court to cancel the ban on presidents standing for consecutive terms, enabling him to stand again in November 2011. Yet his popularity with the masses remains such that he won a comfortable victory, taking 62 per cent of the votes.

This chapter has shown how, during the early years of the twenty-first century, Latin America became one of the most fascinating regions of the world. Starting in Venezuela with the election of Hugo Chávez in 1998, a new trend began to spread across the region. This was the change from neo-liberalism to policies which allowed a country's resources to be shared more equally among the great mass of the population, and which enabled modernization to take place. Of course there were different degrees of change: the USA did its best to divide Mexico, Chile and Guatemala from the rest by making separate trade agreements with them, so that relations between the four states are reasonably cordial. Venezuela, Bolivia, Cuba, Ecuador and Argentina were the most decisive in their rejection of neo-liberalism, while Brazil, Nicaragua and Uruguay were middle of the road, with a mixture of policies.

There was another strand in this move towards modernization – the growth of regional co-operation between states. A number of institutions and organizations were set up; named after Simon Bolívar, the famous nineteenth-century revolutionary leader, the Bolivarian Alternative for the Americas (ALBA) was the creation of Chávez in 2004. In the words of Nikolas Kozloff, it was 'an initiative designed to encourage greater trade, solidarity and exchange between nations standing outside the usual market-based strictures' (i.e. outside

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the US orbit). Its activities went far beyond simple free-trade agreements, to include mutual economic and social assistance. For example Venezuela supplies Cuba with oil from its state-owned refineries at very reasonable prices and in return Cuba has sent thousands of doctors and teachers to work in Venezuela. Cuban doctors have also worked in Bolivia and provided medical supplies. In 2012 the membership of ALBA included Venezuela, Cuba, Bolivia, Ecuador, Nicaragua, Haiti and various small islands in the Caribbean. Discussions were well under way into the adoption of a common currency, the sucre, although there were problems with the small Caribbean islands which were already members of the Eastern Caribbean monetary union.

Another regional organization is the Union of South American Nations (UNASUR), which was set up at a meeting in the Brazilian capital in 2008. It brought together two existing customs unions – Mercosul and the Andean Community of Nations. In 2011 there were 12 member states – Argentina, Brazil, Bolivia, Chile, Colombia, Ecuador, Guyana, Paraguay, Peru, Suriname, Venezuela and Uruguay. The plan was eventually to set up a South American parliament to be situated in Cochabamba, the third largest city in Bolivia.

The Bank of the South was launched in 2009 with initial capital of $20 million, the bulk of which was supplied by Argentina, Brazil and Venezuela, with smaller contributions from Bolivia, Ecuador, Paraguay and Uruguay. The bank provides loans for approved social and infrastructure improvements to any Latin American country as an alternative to the IMF. However, some governments prefer to use smaller regional funds that are on offer, such as the Andean Development Corporation and the state-run Venezuelan Development Bank, known as BANDES. This has branches in Ecuador, Bolivia and Uruguay, and it has been especially helpful to Bolivia in financing educational programmes. Whichever of these alternatives the countries of Latin America decided to choose as a source of funding, the outcome would have been similar: the IMF was on the verge of being eclipsed as a force within the region. In a no-nonsense assessment of the situation, Jason Tockman, an expert on ALBA and Bolivia, declared that 'US influence through international financial institutions like the IMF has collapsed'.

And finally, some of the Latin American countries began a diversification of markets and investment, with China as an increasingly important partner. Venezuela, the leading oil exporter in the hemisphere, delivered quite a blow to Washington's energy policies. Having built up probably the closest relations with China of any Latin American country, Venezuela plans to export increasing amounts of oil to China as part of its effort to reduce its dependence on the openly hostile US government. In fact Latin America as a whole is increasing trade and other relations with China, in particular raw materials exporters such as Brazil, Peru and Chile. For Brazil, now often called 'the farmer of the world', China is now its largest trading partner. These increases are just part of the move toward a more diverse world that is causing considerable agitation among American planners and businessmen, who had assumed for a long time that their global domination would continue indefinitely. As Noam Chomsky explains:

> The former colonies in Latin America have a better chance now than ever before to overcome centuries of subjugation, violence, repression and foreign intervention. … These are exciting prospects for Latin America, and if the hopes can be realized, even partially, the results cannot fail to have a large-scale global impact as well.

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QUESTIONS

1 What were the problems facing the countries of Latin America at the end of the Second World War? Explain why progress in solving these problems was so slow.
2 In what ways and with what motives was the USA involved in the affairs of Latin America during the second half of the twentieth century?
3 'The Cold War was to have profound effects on the economic and political systems of Latin America.' How far do you agree?
4 'The election of Hugo Chávez as president of Venezuela in 1998 was the beginning of a left-wing revolution that was to transform Latin America over the next decade.' Explain what happened in this transformation. Do you think this statement is an accurate assessment of recent events in Latin America, or is it an exaggeration?

There is a document question about US–Latin American relations on the website.

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VI

Global Problems

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Chapter

27 The changing world economy since 1900

SUMMARY OF EVENTS

For much of the nineteenth century Britain led the rest of the world in industrial production and trade. In the last quarter of the century, Germany and the USA began to catch up, and by 1914 the USA was the world's leading industrial nation. The First and Second World Wars caused important changes in the world economy. The USA gained most, economically, from both wars, and it was the USA which became economically dominant as the world's richest nation. Meanwhile, Britain's economy slowly declined, and it was not improved by the fact that Britain stayed outside the European Community until 1973.

In spite of slumps and depressions, the general trend was for the relatively wealthy industrialized countries to get wealthier, while the poorer nations of Africa and Asia (known as the Third World), most of which were once colonies of the European states, became even poorer. However, some Third World countries began to industrialize and become richer, and this caused a split in the Third World bloc. During the last quarter of the twentieth century, new developments came to the forefront. Industrial production and some service industries began to move from the western nations into countries such as China and India, where labour was much cheaper. Western economic systems showed signs of faltering, and there was controversy about which was the most successful type of economy – the US model or the European model. Global warming, caused by the emission of gases such as carbon dioxide, produced problematic climate changes which threatened to do most harm to the poorer countries, which were least able to cope. During the first decade of the twenty-first century, beginning in the USA in 2008, the world suffered an unprecedented financial crisis in which, for a time, the entire capitalist system teetered on the edge of collapse. The US and various European governments saved the banking system with massive bailouts, but could not prevent the world from plunging into recession.

27.1 CHANGES IN THE WORLD ECONOMY SINCE 1900

In one sense, in 1900 there was already a single world economy. A few highly industrialized countries, mainly the USA, Britain and Germany, provided the world's manufactured goods, while the rest of the world provided raw materials and food (known as 'primary products'). The USA treated Latin America (especially Mexico) as an area of 'influence', in the same way that the European states treated their colonies in Africa and elsewhere. European nations usually decided what should be produced in their colonies: the British made sure that Uganda and the Sudan grew cotton for their textile industry; the Portuguese did the same in Mozambique. They fixed the prices at which colonial products were sold as low as possible, and also fixed the prices of manufactured goods exported to the colonies as high as possible. In other words, as historian Basil Davidson (see Further

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Reading for Chapters 24 and 25) puts it: 'the Africans had to sell cheap and buy dear'. The twentieth century brought some important changes:

(a) The USA became the dominant industrial power and the rest of the world became more dependent on the USA

In 1880 Britain produced roughly twice as much coal and pig iron as the USA, but by 1900 the roles had been reversed: the USA produced more coal than Britain and about twice as much pig iron and steel. This growing domination continued right through the century: in 1945, for example, incomes in the USA were twice as high as in Britain and seven times higher than in the USSR; during the next 30 years, American production almost doubled again. What were the causes of the American success?

1 The First World War and after

The First World War and its aftermath gave a big boost to the American economy (see Section 22.3). Many countries which had bought goods from Europe during the war (such as China and the states of Latin America) were unable to get hold of supplies because the war had disrupted trade. This forced them to buy goods from the USA (and also Japan) instead, and after the war they continued to do so. The USA was the economic winner of the First World War and became even richer thanks to the interest on the war loans it had made to Britain and her allies (see Section 4.5). Only the USA was rich enough to provide loans to encourage German recovery during the 1920s, but this had the unfortunate effect of linking Europe too closely with the USA financially and economically. When the USA suffered its great slump (1929–35) (see Section 22.6), Europe and the rest of the world were also thrown into depression. In 1933, in the depth of the depression, about 25 million people were out of work in the USA and as many as 50 million in the world as a whole.

2 The Second World War

The Second World War left the USA the world's greatest industrial (and military) power. The Americans entered the war relatively late and their industry did well out of supplying war materials for Britain and her allies. At the end of the war, with Europe almost at a standstill economically, the USA was producing 43 per cent of the world's iron ore, 45 per cent of its crude steel, 60 per cent of its railway locomotives and 74 per cent of its motor vehicles (see also Section 22.7(e)). When the war was over, the industrial boom continued as industry switched to producing consumer goods, which had been in short supply during the war. Once again, only the USA was rich enough to help western Europe, which it did with Marshall Aid (see Section 7.2(e)). It was not simply that the Americans wanted to be kind to Europe: they had at least two other ulterior motives:

- a prosperous western Europe would be able to buy American goods and thus keep the great American wartime boom going;
- a prosperous western Europe would be less likely to go communist.

(b) After 1945 the world split into capitalist and communist blocs

- *The capitalist bloc* consisted of the highly developed industrial nations – the USA, Canada, western Europe, Japan, Australia and New Zealand. They believed in private enterprise and private ownership of wealth, with profit as the great motivating influence, and ideally, a minimum of state interference.

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- *The communist bloc* consisted of the USSR, its satellite states in eastern Europe, and later, China, North Korea, Cuba and North Vietnam. They believed in state-controlled, centrally planned economies, which, they argued, would eliminate the worst aspects of capitalism – slumps, unemployment and the unequal distribution of wealth.

The next forty or so years seemed like a contest to find out which economic system was best. The collapse of communism in eastern Europe at the end of the 1980s (see Sections 10.6 and 18.3) enabled the supporters of capitalism to claim the final victory; however, communism still continued in China, North Korea, Vietnam and Cuba. This big contest between the two rival economic and political systems was known as *the Cold War*; it had important economic consequences. It meant that both blocs spent enormous amounts of cash on building nuclear weapons and other armaments (see Section 7.4), and on even more expensive space programmes. Many people argued that much of this money could have been better spent helping to solve the problems of the world's poorer nations.

(c) The 1970s and 1980s: serious economic problems in the USA

After many years of continual economic success, the US began to experience problems.

- Defence costs and the war in Vietnam (1961–75) (see Section 8.3) were a constant drain on the economy and the treasury.
- There was a budget deficit every year in the late 1960s. This means that the government was spending more money than it was collecting in taxes, and the difference had to be covered by selling gold reserves. By 1971 the dollar, which was once considered to be as good as gold, was weakening in value.
- President Nixon was forced to devalue the dollar by about 12 per cent and to put a 10 per cent duty on most imports (1971).
- Rising oil prices worsened America's balance-of-payments deficit, and led to the development of more nuclear power.
- President Reagan (1981–9) refused to cut defence spending and tried new economic policies recommended by the American economist Milton Friedman. He argued that governments should abandon all attempts to plan their economies and concentrate on monetarism: this meant exercising a tight control on the money supply by keeping interest rates high. His theory was that this would force businesses to be more efficient. These were policies which Margaret Thatcher was already trying in Britain. At first the new ideas seemed to be working – in the mid-1980s unemployment fell and America was prosperous again. But the basic problem of the US economy – the huge budget deficit – refused to go away, mainly because of high defence spending. The Americans were even reduced to borrowing from Japan, whose economy was extremely successful at that time. The drain on American gold reserves weakened the dollar, and also weakened confidence in the economy. There was a sudden and dramatic fall in share prices (1987), which was followed by similar falls all over the world. In the late 1980s much of the world was suffering from a trade recession.

(d) Japan's success

Japan became economically one of the world's most successful states. At the end of the Second World War Japan was defeated and her economy was in ruins. She soon began to

Table 27.1 **Gross National Product per head of the population in 1992**

Year	*GNP*
1955	200
1978	7 300
1987	15 800
1990	27 000

recover, and during the 1970s and 1980s, Japanese economic expansion was dramatic, as Table 27.1 shows. (For full details see Section 15.2.)

27.2 THE THIRD WORLD AND THE NORTH–SOUTH DIVIDE

During the 1950s the term *Third World* began to be used to describe countries which were not part of the First World (the industrialized capitalist nations) or the Second World (the industrialized communist states). The Third World states grew rapidly in number during the 1950s and 1960s as the European empires broke up and newly independent countries emerged. By 1970 the Third World consisted of Africa, Asia (except the USSR and China), India, Pakistan, Bangladesh, Latin America and the Middle East. They were almost all once colonies or mandates of European powers, and were left in an undeveloped or under-developed state when they achieved independence.

(a) The Third World and non-alignment

The Third World states were in favour of non-alignment, which means that they did not want to be too closely associated with either the capitalist or the communist bloc, and they were very suspicious of the motives of both. Prime Minister Nehru of India (1947–64) saw himself as a sort of unofficial leader of the Third World, which he thought could be a powerful force for world peace. Third World countries deeply resented the fact that both blocs continued to interfere in their internal affairs (neo-colonialism). The USA, for example, interfered unashamedly in the affairs of Central and South America, helping to overthrow governments which they did not approve of; this happened in Guatemala (1954), the Dominican Republic (1965) and Chile (1973). Britain, France and the USSR interfered in the Middle East. Frequent meetings of Third World leaders were held, and in 1979, 92 nations were represented at a 'non-aligned' conference in Havana (Cuba). By this time the Third World contained roughly 70 per cent of the world's population.

(b) Third World poverty and the Brandt Report (1980)

Economically the Third World was extremely poor. For example, although they contained 70 per cent of the world's population, Third World countries only consumed 30 per cent of the world's food, while the USA, with perhaps 8 per cent of the world's population, ate 40 per cent of the world's food. Third World people were often short of proteins and vitamins, and this caused poor health and a high death-rate. In 1980 an international group of

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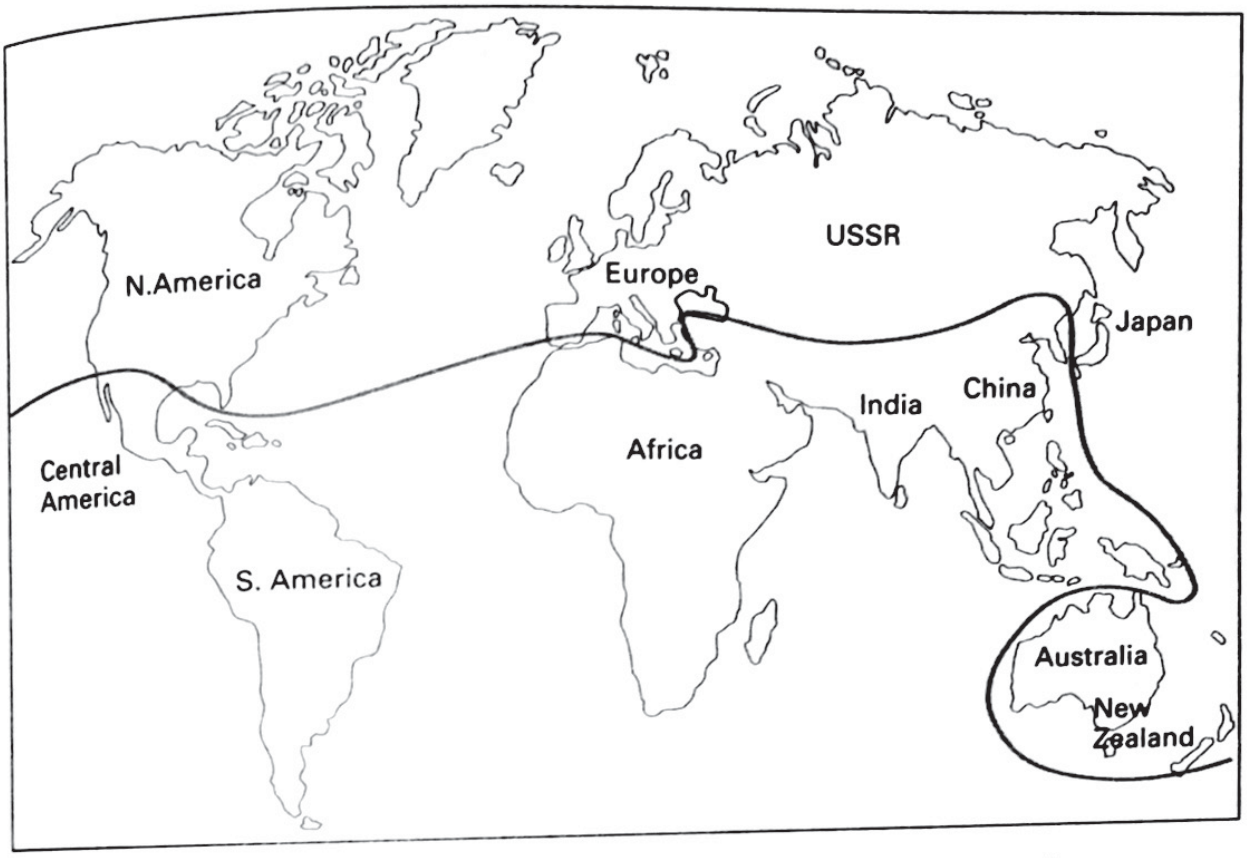

Map 27.1 **The dividing line between North and South, rich and poor**

politicians under the chairmanship of Willi Brandt (who had been chancellor of West Germany from 1967 until 1974), and including Edward Heath (prime minister of Britain 1970–4), produced a report (*the Brandt Report*) on the problems of the Third World. It said that the world could be roughly divided into two parts (see Map 27.1).

The North – the developed industrial nations of North America, Europe, the USSR and Japan, plus Australia and New Zealand.
The South – most of the Third World countries.

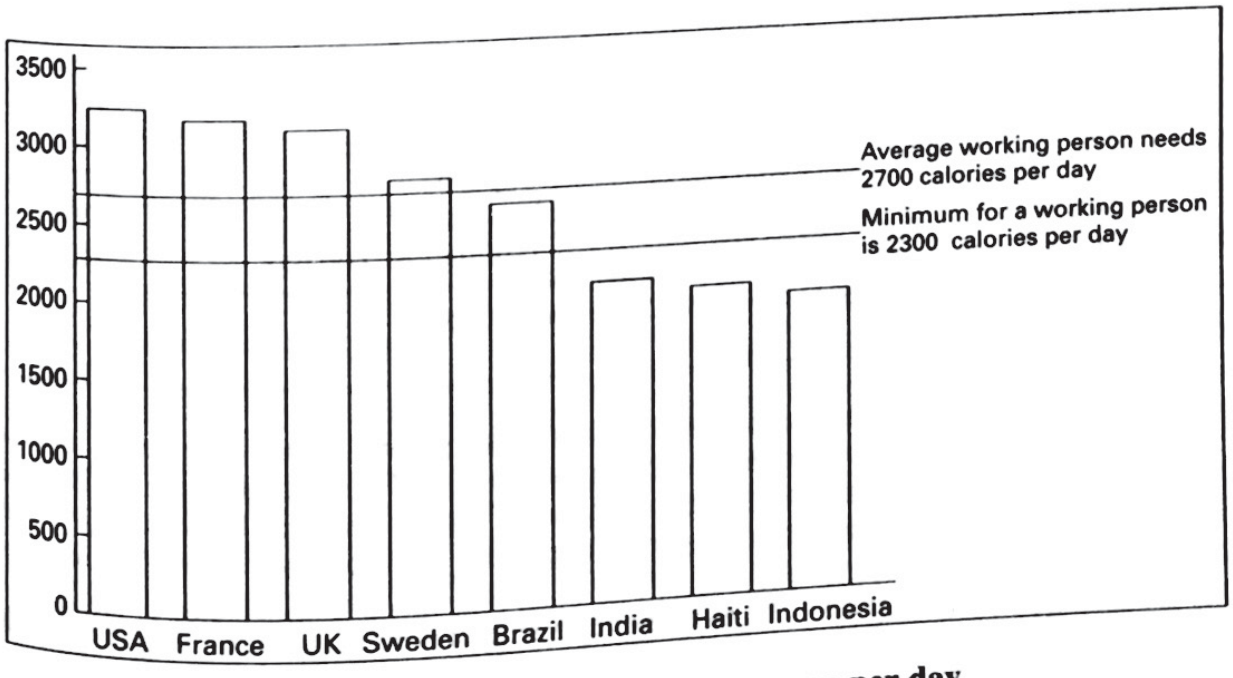

Figure 27.1 **Calorie intake per person per day**

Table 27.2 **Gross National Product per head of the population in 1992 (in US dollars)**

Japan	28 220	Libya	5 310
Taiwan	10 202	Uganda	170
Hong Kong	15 380	Rwanda	250
Singapore	15 750	Tanzania	110
South Korea	6 790	Kenya	330
North Korea	943	Zaire	220
Thailand	1 840	Ethiopia	110
Vietnam	109	Sudan	400
China	380	Somalia	150
		Zimbabwe	570
		Zambia	290
Peru	950	Nigeria	320
Bolivia	680	Mozambique	60
Paraguay	1 340	South Africa	2 670
Brazil	2 770	Algeria	2 020
Argentina	2 780		
Colombia	1 290		
Chile	2 730	India	310
Venezuela	2 900	Pakistan	410
Uruguay	3 340	Bangladesh	220
		Sri Lanka	540
Germany	21 000	Russian Fed.	2 680
France	22 300	Poland	1 960
Britain	17 760	Romania	1 090
Italy	20 510	Czechoslovakia	2 440
Switzerland	36 230		
Greece	7 180		
Spain	14 020		
Portugal	7 450	USA	23 120
Norway	25 800	Canada	20 320
Sweden	26 780	Australia	17 070
Belgium	20 880	Haiti	380
		Dominican Rep.	1 040
		Guyana	330
		Jamaica	1 340
		Trinidad & Tobago	3 940

Source: World Bank statistics, in *Europa World Year Book 1995*.

The report came to the conclusion that the North was getting richer and the South was getting poorer. This gap between the North and South is well illustrated by the statistics of calorie intake (Fig. 27.1) and by the comparison of Gross National Products (GNP) of some typical North and South countries, or 'developed' and 'low and middle' economies (Table 27.2).

GNP is calculated by taking the total money value of a country's total output from all units of production, wherever production is situated; and it includes interest, profits and dividends received from abroad. This total value is divided by the population figure, and

this gives the amount of wealth produced per head of the population. In 1989–90 the GNP of the North averaged over 24 times that of the South. In 1992 a highly developed and efficient country like Japan could boast a GNP of over $28 000 per head of the population, and Norway $25 800. On the other hand, among poor African countries, Ethiopia could manage only $110 per head, the second lowest GNP in the world.

(c) Why is the South so poor?

- The South was and still is economically dependent on the North because of neo-colonialism (see Sections 24.4 and 24.7). The North expected the South to continue providing food and raw materials for them, and expected them to buy manufactured goods from the North. They did not encourage the South to develop their own industries.
- Many states found it difficult to break away from the one-product economies left behind from colonial days, because governments lacked the cash needed to diversify. Ghana (cocoa) and Zambia (copper) found themselves facing this problem. In states like Ghana, which depended for its income on exporting crops, it meant that too little food would be left for the population. Governments then had to spend their scarce money on importing expensive food. A fall in the world price of their main product would be a major disaster. In the 1970s there was a dramatic fall in the world price of such products as cocoa, copper, coffee and cotton. Table 27.3 shows the disastrous effects on the incomes, and therefore the buying power of countries such as Ghana and Cameroon (cocoa), Zambia, Chile and Peru (copper), Mozambique, Egypt and the Sudan (cotton), and Ivory Coast, Zaire and Ethiopia (coffee).
- At the same time, prices of manufactured goods continued to rise. The South had to import from the North. In spite of the efforts of the United Nations Conference on Trade and Development (UNCTAD), which tried to negotiate fairer prices for the Third World, no real improvement was achieved.
- Although a great deal of financial aid was given by the North to the South, much of it was on a business basis – the countries of the South had to pay interest.

Table 27.3 **What commodities could buy in 1975 and 1980**

	Barrels of oil	*Capital ($US)*
Copper (1 tonne could buy)		
1975	115	17 800
1980	58	9 500
Cocoa (1 tonne would buy)		
1975	148	23 400
1980	63	10 200
Coffee (1 tonne would buy)		
1975	148	22 800
1980	82	13 000
Cotton (1 tonne would buy)		
1975	119	18 400
1980	60	9 600

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Sometimes a condition of the deal was that countries of the South had to spend aid on goods from the country which was making the loan. Some countries borrowed directly from banks in the USA and western Europe, so that by 1980 Third World countries owed the equivalent of $500 billion; even the annual interest payable was about $50 billion. Some states were forced to borrow more cash just to pay the interest on the original loan.

- Another problem for Third World countries was that their populations were increasing much faster than those in the North. In 1975 the total world population stood at about 4000 million, and it was expected to reach 6000 million by 1997. Since the population of the South was growing so much faster, a larger proportion of the world's population than ever before would be poor (see Chapter 28).
- Many Third World countries had suffered long and crippling wars and civil wars, which ravaged crops and ruined economies. Some of the worst wars were in Ethiopia, Nicaragua, Guatemala, Lebanon, the Congo/Zaire, Sudan, Somalia, Liberia, Sierra Leone, Mozambique and Angola.
- Drought was sometimes a serious problem in Africa. Niger in West Africa was badly affected: in 1974 it produced only half the food crops grown in 1970 (mainly millet and sorghum), and about 40 per cent of the cattle died. As global warming gathered pace towards the end of the century, droughts became more frequent and many countries were dependent on overseas aid to feed their people.

(d) The Brandt Report (1980) was full of good ideas

For example, it pointed out that it was in the North's interests to help the South to become more prosperous, because that would enable the South to buy more goods from the North. This would help to avoid unemployment and recession in the North. If just a fraction of the North's spending on armaments was switched to helping the South, vast improvements could be made. For example, for the price of one jet fighter (about $20 million), 40 000 village pharmacies could be set up. The Report went on to make some important recommendations which, if carried out, would at least eliminate hunger from the world:

- the rich nations of the North should aim to be giving 0.7 per cent of their national income to poorer countries by 1985 and 1.0 per cent by the year 2000;
- a new World Development Fund should be set up in which decision-making would be more evenly shared between lenders and borrowers (not like the International Monetary Fund and the World Bank, which were dominated by the USA);
- an international energy plan should be drawn up;
- there should be a campaign to improve agricultural techniques in the South, and an international food programme should be drawn up.

Did the Brandt Report change anything? Sadly, there was no immediate improvement in the general economic situation of the South. By 1985 very few countries had reached the suggested 0.7 per cent giving target. Those that did were Norway, Sweden, Denmark, the Netherlands and France; however, the USA gave only 0.24 per cent and Britain 0.11 per cent. There was a terrible famine in Africa, especially in Ethiopia and the Sudan in the mid-1980s, and the crisis in the poorer parts of the Third World seemed to be worsening. Throughout the 1990s the US economy boomed under the Clinton administration, whereas the plight of the Third World became even more serious. At the end of 2003 the UN reported that 21 Third World states, 17 of them in Africa, were in crisis because of a combination of natural disasters, AIDS, global warming and civil wars (see Section 25.15). Yet the richest 1 per cent of the world's population (around 60 million) received

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as much income as the poorest 57 per cent. Norway was top of the UN's league table for human development: Norwegians had a life expectancy of 78.7 years, there was a literacy rate of virtually 100 per cent, and annual income was just under $30 000. In Sierra Leone life expectancy was about 35, the literacy rate was 35 per cent and annual income averaged $470. The USA seemed to attract the most hostility and resentment on account of this imbalance of wealth; it was widely believed that the growth of terrorism – especially the 11 September attacks on the USA – was a desperate response to the failure of peaceful attempts to bring about a fairer world economic system (see Sections 12.1 and 12.2).

UN economic advisers were clear about what needed to be done. It was up to the West to remove trade barriers, dismantle its over-generous system of subsidies, provide greater debt relief, and double the amount of aid from $50 billion to $100 billion a year. This would enable poor countries to invest in clean water systems, rural roads, education and proper healthcare.

27.3 THE SPLIT IN THE THIRD WORLD ECONOMY

During the 1970s some Third World states began to become more prosperous, sometimes thanks to the exploitation of natural resources such as oil, and also because of industrialization.

(a) Oil

Some Third World states were lucky enough to have oil resources. In 1973 the members of the Organization of Petroleum Exporting Countries (OPEC), partly in an attempt to conserve oil supplies, began to charge more for their oil. The Middle East oil-producing states made huge profits, as did Nigeria and Libya. This did not necessarily mean that their governments spent the money wisely or for the benefit of their populations. One African success story, however, was provided by Libya, the richest country in Africa thanks to its oil resources and the shrewd policies of its leader, Colonel Gaddafi (who took power in 1969). He used much of the profits from oil on agricultural and industrial development, and to set up a welfare state. This was one country where ordinary people benefited from oil profits; with a GNP of £5460 in 1989, Libya could claim to be almost as economically successful as Greece and Portugal, the poorest members of the European Community.

(b) Industrialization

Some Third World states industrialized rapidly and with great success. These included Singapore, Taiwan, South Korea and Hong Kong (known as the four 'Pacific tiger' economies), and among others, Thailand, Malaysia, Brazil and Mexico.

The GNPs of the four 'tiger' economies compared favourably with those of many European Community countries. The success of the newly industrialized countries in world export markets was made possible partly because they were able to attract firms from the North who were keen to take advantage of the much cheaper labour available in the Third World. Some firms even shifted all their production to newly industrialized countries, where low production costs enabled them to sell their goods at lower prices than goods produced in the North. This posed serious problems for the industrialized nations of the North, which were all suffering high unemployment during the 1990s. It seemed that

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the golden days of western prosperity might have gone, at least for the foreseeable future, unless their workers were prepared to accept lower wages, or unless companies were prepared to make do with lower profits.

In the mid-1990s the world economy was moving into the next stage, in which the Asian 'tigers' found themselves losing jobs to workers in countries such as Malaysia and the Philippines. Other Third World states in the process of industrializing were Indonesia and China, where wages were even lower and hours of work longer. Jacques Chirac, the French president, expressed the fears and concerns of many when he pointed out (April 1996) that developing countries should not compete with Europe by allowing miserable wages and working conditions; he called for a recognition that there are certain basic human rights which need to be encouraged and enforced:

- freedom to join trade unions and the freedom for these unions to bargain collectively, for the protection of workers against exploitation;
- abolition of forced labour and child labour.

In fact most developing countries accepted this when they joined the International Labour Organization (ILO) (see Section 9.5(b)), but accepting conditions and keeping to them were two different things.

27.4 THE WORLD ECONOMY AND ITS EFFECTS ON THE ENVIRONMENT

As the twentieth century wore on, and the North became more and more obsessed with industrialization, new methods and techniques were invented to help increase production and efficiency. The main motive was the creation of wealth and profit, and very little attention was paid to the side effects all this was having. During the 1970s people became increasingly aware that all was not well with their environment, and that industrialization was causing several major problems:

- Exhaustion of the world's resources of raw materials and fuel (oil, coal and gas).
- Massive pollution of the environment. Scientists realized that if this continued, it was likely to severely damage the ecosystem. This is the system by which living creatures, trees and plants function within the environment and in which they are all interconnected. 'Ecology' is the study of the ecosystem.
- Global warming – the uncontrollable warming of the Earth's atmosphere caused by the large quantities of gases emitted from industry.

(a) Exhaustion of the world's resources

- Fossil fuels – coal, oil and natural gas – are the remains of plants and living creatures which died hundreds of millions of years ago. They cannot be replaced, and are rapidly being used up. There is probably plenty of coal left, but nobody is quite sure just how much remains of the natural gas and oil. Oil production increased enormously during the twentieth century, as Figure 27.2 shows. Some experts believe that all the oil reserves will be used up early in the twenty-first century. This was one of the reasons why OPEC tried to conserve oil during the 1970s. The British responded by successfully drilling for oil in the North Sea, which made them less dependent on oil imports. Another response was to develop alternative sources of power, especially nuclear power.

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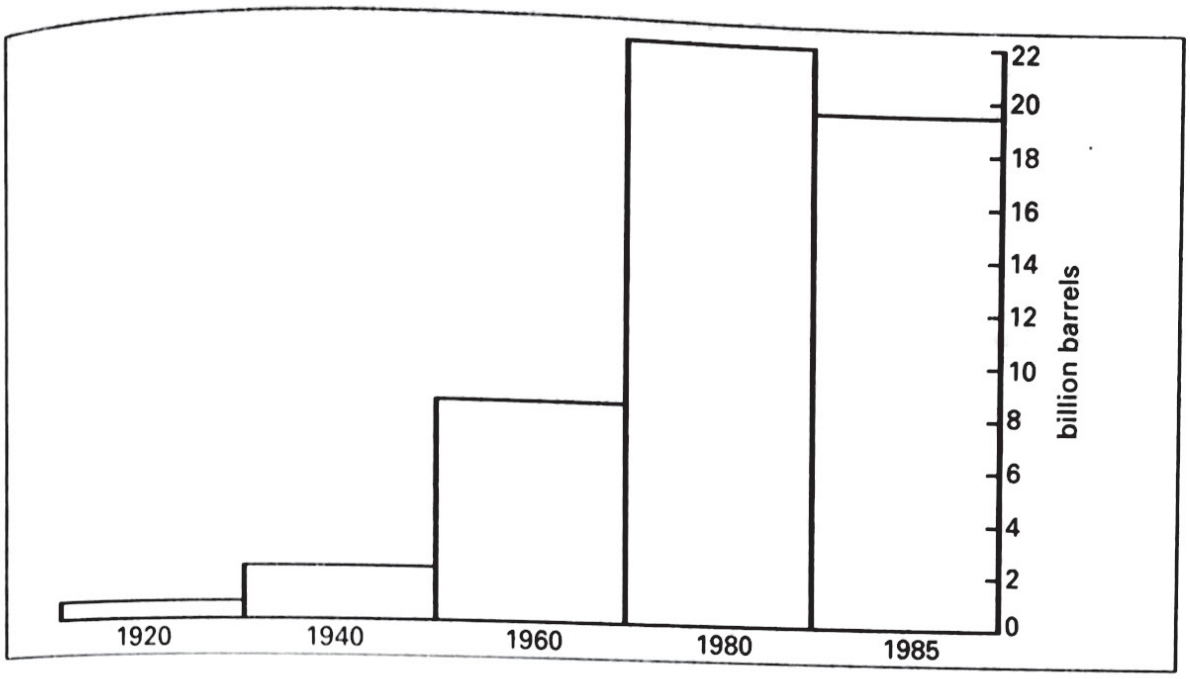

Figure 27.2 **World oil production in billions of barrels per year**

- Tin, lead, copper, zinc and mercury were other raw materials being seriously depleted. Experts suggested that these might all be used up early in the twenty-first century, and again it was the Third World which was being stripped of the resources it needed to help it escape from poverty.
- Too much timber was being used. About half of the world's tropical rainforests had been lost by 1987, and it was calculated that about 80 000 square kilometres, an area roughly the size of Austria, was being lost every year. A side effect of this was the loss of many animal and insect species which had lived in the forests.
- Too many fish were being caught and too many whales killed.
- The supply of phosphates (used for fertilizers) was being rapidly used up. The more fertilizers farmers used to increase agricultural yields in an attempt to keep pace with the rising population, the more phosphate rock was quarried (an increase of 4 per cent a year since 1950). Supplies were expected to be exhausted by the middle of the twenty-first century.
- There was a danger that supplies of fresh water might soon run out. Most of the fresh water on the planet is tied up in the polar ice caps and glaciers, or deep in the ground. All living organisms – humans, animals, trees and plants – rely on rain to survive. With the world's population growing by 90 million a year, scientists at Stanford University (California) found that in 1995, humans and their farm animals, crops and forestry plantations were already using up a quarter of all the water taken up by plants. This leaves less moisture to evaporate and therefore a likelihood of less rainfall.
- The amount of land available for agriculture was dwindling. This was partly because of spreading industrialization and the growth of cities, but also because of wasteful use of farmland. Badly designed irrigation schemes increased salt levels in the soil. Sometimes irrigation took too much water from lakes and rivers, and whole areas were turned into deserts. Soil erosion was another problem: scientists calculated that every year about 75 billion tons of soil were washed away by rain and floods or blown away by winds. Soil loss depended on how good farming practices were: in western Europe and the USA (where methods were good), farmers lost on average 17 tons of topsoil every year from each hectare. In Africa, Asia and South

America, the loss was 40 tons a year. On steep slopes in countries like Nigeria, 220 tons a year were being lost, while in some parts of Jamaica the figure reached 400 tons a year.

An encouraging sign was the setting-up of *the World Conservation Strategy* (1980), which aimed to alert the world to all these problems.

(b) Pollution of the environment – an ecological disaster?

- Discharges from heavy industry polluted the atmosphere, rivers, lakes and the sea. In 1975 all five Great Lakes of North America were described as 'dead', meaning that they were so heavily polluted that no fish could live in them. About 10 per cent of the lakes in Sweden were in the same condition. Acid rain (rain polluted with sulphuric acid) caused extensive damage to trees in central Europe, especially in Germany and Czechoslovakia. The USSR and the communist states of eastern Europe were guilty of carrying out the dirtiest industrialization: the whole region was badly polluted by years of poisonous emissions.
- Getting rid of sewage from the world's great cities was a problem. Some countries simply dumped sewage untreated or only partially treated straight into the sea. The sea around New York was badly polluted, and the Mediterranean was heavily polluted, mainly by human sewage.
- Farmers in the richer countries contributed to the pollution by using artificial fertilizers and pesticides, which drained off the land into streams and rivers.
- Chemicals known as chlorofluorocarbons (CFCs), used in aerosol sprays, refrigerators and fire extinguishers, were found to be harmful to the ozone layer which protects the Earth from the sun's harmful ultraviolet radiation. In 1979, scientists discovered that there was a large hole in the ozone layer over the Antarctic; by 1989 the hole was much larger and another hole had been discovered over the Arctic. This meant that people were more likely to develop skin cancers because of the unfiltered radiation from the sun. Some progress was made towards dealing with this problem, and many countries banned the use of CFCs. In 2001 the World Meteorological Organization reported that the ozone layer seemed to be mending.
- Nuclear power causes pollution when radioactivity leaks into the environment. It is now known that this can cause cancer, particularly leukaemia. It was shown that of all the people who worked at the Sellafield nuclear plant in Cumbria (UK) between 1947 and 1975, a quarter of those who have since died, died of cancer. There was a constant risk of major accidents like the explosion at Three Mile Island in the USA in 1979, which contaminated a vast area around the power station. When leaks and accidents occurred, the authorities always assured the public that nobody had suffered harmful effects; however, nobody really knew how many people would die later from cancer caused by radiation.

  The worst ever nuclear accident happened in 1986 at Chernobyl in Ukraine (then part of the USSR). A nuclear reactor exploded, killing 35 people and releasing a huge radioactive cloud which drifted across most of Europe. Ten years later it was reported that hundreds of cases of thyroid cancer were appearing in areas near Chernobyl. Even in Britain, a thousand miles away, hundreds of square miles of sheep pasture in Wales, Cumbria and Scotland were still contaminated and subject to restrictions. This also affected 300 000 sheep, which had to be checked for excessive radioactivity before they could be eaten. Concern about the safety of nuclear power led many countries to look towards alternative sources of power which were safer, particularly solar, wind and tide power.

One of the main difficulties to be faced is that it would cost vast sums of money to put all these problems right. Industrialists argue that to 'clean up' their factories and eliminate pollution would make their products more expensive. Governments and local authorities would have to spend extra cash to build better sewage works and to clean up rivers and beaches. In 1996 there were still 27 power-station reactors in operation in eastern Europe of similar elderly design to the one which exploded at Chernobyl. These were all threatening further nuclear disasters, but governments claimed they could afford neither safety improvements nor closure. The following description of Chernobyl from the *Guardian* (13 April 1996) gives some idea of the seriousness of the problems involved:

> At Chernobyl, the scene of the April 1986 explosion, just a few miles north of the Ukrainian capital Kiev, the prospect is bleak. Two of the station's remaining reactors are still in operation, surrounded by miles of heavily contaminated countryside. Radioactive elements slowly leach into the ground water – and hence into Kiev's drinking supply – from more than 800 pits where the most dangerous debris was buried ten years ago.

Nuclear reactors were also at risk from natural disasters. In May 2011 a huge tsunami hit the north-east coast of Japan. As well as killing thousands of people, it flooded a nuclear power station in Fukushima. First the six nuclear reactors were battered by high waves, and then the basement, where the emergency generators were situated, was submerged, disabling the entire plant. Again the ongoing problem was how best to deal with the widespread radioactive contamination. There was a great outburst of anti-government feeling when it later emerged that the authorities had ignored and then lied about reports of design weaknesses in the reactors.

(c) Genetically modified (GM) crops

One of the economic issues that came to the forefront during the 1990s, and which developed into a political confrontation between the USA and the EU, was the growing of genetically modified crops. These are plants injected with genes from other plants which give the crops extra characteristics. For example, some crops can be made to tolerate herbicides that kill all other plants; this means that the farmer can spray the crop with a 'broad-spectrum' herbicide that will destroy every other plant in the field except his crop. Since weeds use up precious water and soil nutrients, GM crops should produce higher yields and require less herbicide than conventional crops. Some GM crops have been modified to produce a poison which kills pests that feed on them, others have been modified so that they will grow in salty soil. The main GM crops grown are wheat, barley, maize, oilseed rape, soya beans and cotton. Advocates of GM crops claim that they represent one of the greatest advances ever achieved in farming; they provide healthier food, produced in a more efficient and environmentally friendly way. Given the problem of the growing world population and the difficulties of feeding everybody, supporters see GM crops as perhaps a vital breakthrough in solving the world food problem. By 2004 they were being grown by at least 6 million farmers in 16 countries, including the USA, Canada, India, Argentina, Mexico, China, Colombia and South Africa. The main supporters of GM crops were the Americans, who were also the world's largest exporter.

However, not everybody was happy about this situation. Many people object to GM technology on the grounds that it can be used to create unnatural organisms – plants can be modified with genes from another plant or even from an animal. There are fears that genes might escape into wild plants and create 'superweeds' that cannot be killed; GM crops might be harmful to other species and also in the long term to the humans who eat

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them. Genes escaping from GM crops might be able to pollinate organically growing crops, which would ruin the organic farmers involved. These unfortunate farmers might find themselves being sued for having GM genes in their crops, even though they had not knowingly planted such seeds. The main objections came from Europe; although some European countries – Germany and Spain for example – grew GM crops, the amounts were small. Scientists on the whole tended to reserve judgement, claiming that there should be long field trials to show whether or not GM crops were harmful, both for the environment and for public health. Opinion polls showed that around 80 per cent of the European public had grave doubts about their safety; several countries, including Austria, France, Germany, Italy and Greece, banned imports of individual GMs either for growing or for use as food. Americans, on the other hand, insisted that the crops had been thoroughly tested and approved by the government, and that people had been eating GM foods for several years without any apparent ill effects.

Another European objection was that the GM industry was controlled by a few giant agriculture businesses, most of them American. In fact, by 2004 the American company Monsanto was producing more than 90 per cent of GM crops worldwide. The feeling was that such companies had too much control over world food production, which would enable them to exert pressure on countries to buy their products and force more traditional farmers out of the market. The controversy came to a head in April 2004 when the USA called on the World Trade Organization (WTO) to take action. The USA accused the EU of breaking WTO free-trade rules by banning GM imports without any scientific evidence to support their case.

However, by no means does everybody in the USA support GM farming. An organization called the Centre for Food Safety (CFS) has launched several cases in the Supreme Court, most notably in 2006 when a group of organic alfalfa farmers sued Monsanto for growing GM alfalfa, without first carrying out safety checks. They were afraid that their organic alfalfa would be cross-pollinated by GM alfalfa, which would make their organic alfalfa unsaleable in countries where GM crops were banned. The judgement was that the planting of GM alfalfa should stop until a full-scale investigation into possible ill effects had been carried out. A spokesman for Monsanto stated that they were confident that tests would be completed in time for the autumn planting in 2010. Encouraged by this result, the CFS organized another lawsuit against Monsanto in 2009, this time against the growing of GM sugar beet. In August 2010 a similar judgement halted the planting of GM sugar beet until the necessary tests had been completed.

At the same time not everybody in Europe was against GM farming. In Britain, for example, at the Rothamsted Agricultural Research Centre at Harpenden, experiments were being carried out with GM wheat which is resistant to several kinds of insects and should therefore need fewer pesticides. In June 2012 a group of protesters calling themselves 'Take the Flour Back' threatened to destroy the crop. Several hundred protesters, including some from France, attempted to invade the research centre, but were prevented by a large police presence. Fortunately they were persuaded to call off their plan and meet the research team for discussions. At the end of June 2012 it was revealed that recent tests in China on GM cotton crops showed that some insects were developing increased resistance to these crops, and that an increasing number of other pests were developing in and around the cotton crop, and these were affecting surrounding crops too. In other words, the early benefits were now being replaced by unexpected problems. And so the basic problem still remains: how is agriculture going to produce enough to feed the steadily growing world population, given that the amount of land suitable for agricultural production makes up only about 11 per cent of the earth's surface, and that a lot of this land is being contaminated by salt (salination), and therefore unsuitable for agriculture? Continuing global warming and rising sea levels are not likely to improve the situation (see the next section). At least there was one piece of good news in 2012 – in March it was announced that

Australian scientists had tested a new strain of wheat that could increase yields by 25 per cent in saline soils. Perhaps in the end, if the world is to survive, we shall have no choice but to accept GM produce. On the other hand it could be that scientists will succeed in producing new non-GM strains of all foodstuffs, like the Australian wheat, which will give higher yields from the same size of land area.

27.5 GLOBAL WARMING

(a) Early concerns

In the early 1970s scientists became concerned about what they called the 'greenhouse effect' – the apparently uncontrollable warming of the earth's atmosphere, or 'global warming', as it became known. It was caused by large amounts of carbon dioxide, methane and nitrous oxide, three gases produced during various industrial processes and by the burning of fossil fuels, being released into the atmosphere. These gases acted like the glass roof of a greenhouse, trapping and magnifying the sun's heat. Opinions differed about exactly what its effects would be; one alarming theory was that the ice caps, glaciers and snow in the polar regions would melt, causing the level of the sea to rise, and flooding large areas of land. It was also feared that Africa and large parts of Asia could become too hot for people to live in, and there could be violent storms and prolonged drought.

Some scientists dismissed these theories, arguing that if indeed the world was becoming warmer, it was a natural climatic change, not a man-made one. They played down the threats of flooding and drought, and accused those who suggested them of being anti-West and anti-industrialization. Industrialists themselves naturally welcomed these sympathizers, and as the debate between the two camps developed, nothing was done to reduce or control emissions of greenhouse gases.

Gradually the scientific evidence became more convincing: the Earth's average temperature was definitely increasing significantly, and the fossil-burning habits of humans were responsible for the changes. The evidence was enough to convince US vice-president Al Gore, who in 1992 wrote a pamphlet advocating international action to combat the greenhouse effect. President Clinton later proclaimed: 'We must stand together against the threat of global warming. A greenhouse may be a good place to raise plants; it is no place to nurture our children.' In June 1992 the UN organized the Earth Summit conference in Rio de Janeiro (Brazil) to discuss the situation. Representatives of 178 nations attended, including 117 heads of state; it was probably the largest gathering of world leaders in history. Most of them signed a range of treaties undertaking to protect the environment and reduce emissions of greenhouse gases.

However, signing treaties was one thing, enforcing them was quite another. For example, in 1993 when President Clinton introduced a bill to tax energy, the Republican majority in the Senate, many of whose supporters were industrialists and businessmen, threw it out. By this time many other countries were showing concern at the worsening situation. In 1995 an Intergovernmental Panel on Climatic Change produced a report outlining the probable effects of global warming and concluding that there could be little doubt that human actions were to blame.

(b) The Kyoto Convention (1997) and after

In 1997 another large international conference was held, this time in Kyoto (Japan), to work out a plan for reducing harmful emissions. It was appropriate that the conference was held in Kyoto, since, of all the industrialized countries, the Japanese had achieved most

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success in limiting their carbon emissions; and they had achieved it by heavy taxation on power and petrol. Statistics were worked out to show how much carbon each country was producing. The USA was by far the biggest culprit, emitting an average of 19 tons of carbon per head a year; Australia was not far behind with 16.6 tons per head. Japan emitted 9 tons per head a year, while the countries of the EU averaged 8.5 tons. On the other hand, the countries of the Third World emitted very modest amounts per head – South America 2.2 tons and Africa less than one ton.

The target set was to return global emissions to their 1990 levels by 2012. This meant that countries would have to reduce their emissions by different amounts to comply with the regulations; for example, the USA was required to reduce by 7 per cent, whereas France needed no reduction, since by 1997 the French were producing 60 per cent of their energy from nuclear power. In the end, 86 nations signed the agreement, which became known as the Kyoto Protocol. However, over the next few years this seemed to have little effect; in 2001 the Intergovernmental Panel on Climatic Change reported that climatic conditions were getting steadily worse. The 1990s was the hottest decade of the millennium and 1998 was the hottest year. In March 2001 the Kyoto Protocol was dealt a fatal blow when newly elected US President Bush announced that he would not ratify it. 'I will not accept a plan that will harm our economy and hurt American workers', he said. 'First things first are the people who live in America. That's my priority.'

Thus, early in the twenty-first century the world found itself in a situation where the USA, with no more than 6 per cent of the planet's population, was emitting a quarter of all the greenhouse gases, and would continue to do so, whatever the consequences for the rest of the world. In 2003 the effects of global warming were increasingly worrying. The UN calculated that at least 150 000 people had died during the year as a direct result of climate change – prolonged drought and violent storms. During that summer, 25 000 people died in Europe because of the unusually high temperatures. The increased warmth and the storms provided ideal breeding conditions for mosquitoes, which were spreading into mountainous areas where it had been too cold for them. Consequently the death rate from malaria increased sharply, especially in Africa. Droughts caused famine and malnutrition, so that people were more prone to catch life-threatening diseases.

(c) What happens next?

It was clear to climatologists that drastic measures were needed if dire consequences were to be avoided. Sir John Houghton, the former head of the British Meteorological Office, compared climate change to a weapon of mass destruction: 'like terrorism, this weapon knows no boundaries. It can strike anywhere, in any form – a heatwave in one place, a drought or a flood or a storm surge in another.' It was also being suggested that the Kyoto agreement, designed when climate change was thought to be less destructive, would be insufficient to make much difference to the problem, even if it were fully implemented. The tragedy is that the world's poorest countries, which have contributed hardly anything to the build-up of greenhouse gases, are likely to be the ones most seriously affected. Recently published statistics suggested that in 2004 some 420 million people were living in countries which no longer had enough crop land to grow their own food; half a billion people lived in areas prone to chronic drought. The threats are exacerbated by the pressure of the growing world population (see Sections 28.1–3). A number of measures have been suggested:

- Professor John Schnellnhuber, director of the UK-based Tyndall Centre, which researches climate change, believes that an adaptation fund should be set up under the auspices of the UN and financed by wealthy polluters through levies based on

the amount of emissions they make. The fund would be used to help poorer countries to improve their infrastructures, water industries and food production, and to cope with changes such as higher temperatures, rising river and sea levels, and tidal surges.

- A World Environment Court should be set up to enforce global agreements like the Kyoto Protocol. States must face fines large enough to deter them from breaking the rules.
- At national level, companies should be fined heavily for polluting rivers and dumping hazardous waste.
- An all-out effort should be made to develop new technologies so that 'green' power – solar, wind, tide and wave – will replace fossil fuels. Some people have suggested expanding nuclear power, an option which the French have chosen to take.

The main objections to all these alternatives are that they require fundamental changes in the way people live, and organize their countries' economies, and they will cost a lot of money to secure returns that will only become apparent in the future. A few scientists have suggested that the best thing is to do nothing at all at present, and hope that future scientists will find new and cheap methods of reducing greenhouse gases. However, in the words of Murray Sayle, 'long before that happy day, Miss Liberty may well be up to her bodice in New York harbour'. There were further worrying developments: in 2007 and 2008 a series of Gallup polls were held in 127 countries. These showed that over a third of the world's population were unaware of global warming. A survey in the USA in October 2009 showed that only 35 per cent of Republicans thought there was any reliable evidence that global warming was actually taking place. More Gallup polls in 111 countries in 2010 showed a disturbing fall in the USA and Europe in the percentage of people who thought that global warming was a serious threat. However, in Latin America the opposite was happening: an increasing number of people were worried about the effect that global warming was going to have on their families.

It was fitting that Latin America hosted the next two important conferences: the UN Climate Change Conference in Cancun, Mexico at the end of 2010, and the UN Conference on Sustainable Development in Rio de Janeiro, Brazil in June 2012. There was little to show from the Cancun Conference. There was simply an agreement, not a binding treaty, that member states would aim, as a matter of urgency, to reduce emissions of greenhouse gases sufficiently to limit global warming to 2° C. Delegates from 190 nations attended the 2012 Conference in Rio de Janeiro. Brazilian president Dilma Rousseff told the conference that Brazil had made significant progress in reducing emissions, and was now providing 45 per cent of its energy from renewable sources, mainly hydropower. UN secretary-general Ban Ki-moon pointed out that the world had not yet risen to the challenge of reducing greenhouse-gas emissions by concentrating on sustainable development. The outcome of the conference was disappointing: no specific reduction targets were set and a proposed fund of $30 billion to help the transition to a green economy was dropped from the final agreement. Koomi Naidoo, the international director of Greenpeace, described the conference as an epic failure. 'It has failed on equity, failed on ecology and failed on economy.' Ban Ki-moon summed up the situation well. He pointed out that 20 years ago there were 50 billion people in the world; today there are 75 billion. By 2030 we shall need 50 per cent more food and 45 per cent more energy than we need today. 'Let us not forget the scarcest resource of all – time. We are running out of time.' As if to underline his concern, it was announced in September 2012 that sea ice in the Arctic had shrunk to its smallest extent ever recorded. Scientists were predicting that within 20 years the Arctic Ocean would be completely ice-free in the summer months. John Sauven, the head of Greenpeace UK, warned that 'we are on the edge of one of the most significant moments in environmental history as sea ice heads towards a new record low. The loss of

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sea ice will be devastating, raising global temperatures that will impact on our ability to grow food, and causing extreme weather around the world.'

27.6 THE WORLD ECONOMY AT THE TURN OF THE MILLENNIUM

Since the USA was unquestionably the most powerful state economically during the last decade of the twentieth century, it was natural that the US economic system should come under close scrutiny. The EU, which some people saw as a rival power bloc to the USA, had a rather different view of how a market economy and society should be organized, in terms of international trade, care of the environment, aid and debt relief. According to British analyst Will Hutton, in his book *The World We're In* (2003): 'the relationship between the two power blocs is the fulcrum on which the world order turns. Managed skilfully, this could be a great force for good; managed badly, it could give rise to incalculable harm.'

(a) The American economic model

The US economic system evolved out of American traditions of freedom and the sanctity of property. The American right-wing attitude was that the law of private property and the freedom from government interference should be supreme. This was why the USA came into existence in the first place; people emigrated to the USA so that they could enjoy that freedom. It followed that the US federal government should interfere with people's lives as little as possible, its main function being to safeguard national security.

On the question of social welfare – to what extent the state should be responsible for the care of the poor and helpless – attitudes were divided. The right-wing or conservative attitude was based on 'rugged individualism' and self-help. Taxation was viewed as an invasion of private property, and government regulations were seen as restraints on freedom and prosperity. The liberal attitude was that 'rugged individualism' should be tempered by the idea of a 'social contract'. This held that the state should provide basic welfare in return for the respect and obedience of its citizens. Hence Roosevelt's New Deal and Johnson's Great Society – programmes introduced by Democrat administrations, which included large elements of social reform. For 16 out of the 24 years preceding 2005, the US had Republican governments which favoured the right-wing approach.

Both schools of thought had their supporters and champions in the USA. For example John Rawls, in his book *A Theory of Justice* (Oxford University Press, 1973), put forward a theory of 'justice as fairness'. He argued in favour of equality and claimed that it was the duty of government to provide welfare and some redistribution of wealth through taxation. In reply, Robert Nozick, in his book *Anarchy, State and Utopia* (Harvard University Press, 1974), argued that property rights should be strictly upheld, that there should be minimal government intervention, minimal taxation and minimal welfare and redistribution. Nozick's theories had a great influence on the New Right and were taken up by the neo-conservative branch of the Republican party. They were seen in action during the Reagan administration (1981–9), and even more so under George W. Bush (2001–9), when both taxes and welfare programmes were reduced. With neo-conservatism in the ascendant in the USA, it was only to be expected that, as the USA assumed the role of world leadership, the same principles would be extended to American international dealings; hence American reluctance to become involved in initiatives to help the Third World – on issues such as debt relief, international trade and global warming. There was no denying that the American economic system in its different variants had achieved remarkable success over the years. However, in the early twenty-first century the New Right approach was clearly

faltering (see Section 23.6(d)); many liberal Americans were looking towards the European model as a potentially better way of providing a just economic and social order.

(b) The European economic model

The economic and social systems of western, democratic Europe, which took shape after the Second World War, varied from country to country. But they all shared certain basic characteristics – provision of social welfare and public services, particularly education and health, and a reduction in inequality. It was expected that the state would take an active role in regulating business and society and in operating a tax system that redistributed income more fairly and provided the revenue to finance education and healthcare. There was also the assumption that big business had a part in the social contract – it had responsibilities to society and so must function in a socially acceptable way, looking after its employees, paying fair wages and taking care of the environment. Whereas in the USA the interests of shareholders were paramount, in most parts of Europe the perception was that the interests of the entire business must come first; dividends were kept relatively low so that high investment was not neglected. Trade unions were stronger than in the USA, but on the whole they operated responsibly. This system produced highly successful companies and relatively fair and just societies.

Outstanding examples of successful European companies include the German car and truck manufacturer Volkswagen: some 20 per cent of the company's shares are owned by the state government of Lower Saxony, shareholders' voting rights are limited to 20 per cent and the company pays only 16 per cent of its profits as dividends – none of which would be allowed to happen in the USA. Michelin, the French tyre manufacturer, and the Finnish company Nokia, the world's largest manufacturer of mobile phones, are high-performance organizations run on similar lines to Volkswagen. Another European success story is the joint German, French and British Airbus, which can claim to be the world's most successful aircraft manufacturer, surpassing even the USA's Boeing company. Western European states have generous welfare systems financed by a combination of taxation and social security contributions, and a high standard of public health and education. Even in Italy, Spain, Greece and Portugal, with their history of fascism and military dictatorships, the social contract exists, and unemployment insurance is the highest in Europe.

Many American analysts were critical of the European system, since during the 1990s unemployment rose in Europe, while the USA enjoyed an economic boom. The Americans claimed that European problems were caused by high taxation, over-generous welfare systems, the activities of trade unions and too much regulation. Europeans blamed their difficulties on the need to keep inflation under control so that they would be able to join the single currency launched in 1999. Europeans were confident that once that hurdle had been surmounted, economic growth and job creation would recover. European confidence in their system received a boost during the Bush administration, when it was observed that all was not well with the US economy.

(c) The American system in action

Even during the Clinton administration, the USA extended its economic principles into its global dealings. American interests usually came first, so much so that many people complained that globalization meant Americanization. Some examples were:

- During the 1990s the USA gained control of the International Monetary Fund (IMF), which meant that the Americans could decide which countries should

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receive aid, and could insist that governments adopted policies of which the USA approved. This happened to many Latin American countries as well as Korea, Indonesia and Thailand. Often the conditions imposed made recovery harder instead of easier. In 1995, when the World Bank suggested that debt relief was vital for some poor countries, it met stiff opposition from the USA, and its chief economist felt compelled to resign. Basically these developments meant that the USA could control the world's financial system.

- In 1994 the USA used the General Agreement on Tariffs and Trade (GATT) to force the EU to open all its voice communications (post, telephone and telegraphs) to international competition. In 1997 the World Trade Organization (WTO), which succeeded GATT in 1995, agreed that 70 countries should be opened up to US telecoms companies on American terms. By 2002 there were 180 commercial satellites orbiting in space, and 174 of them were American. The USA all but controlled the world's communications systems. It was to counter this that the EU insisted on launching its own Galileo space satellite system (see Section 10.8(d)).
- In March 2002 the Bush administration imposed import duties on foreign steel in order to protect the American steel industry. This brought bitter protests from the EU, since the function of the WTO was to encourage free trade. The USA resisted the pressure until December 2003; then, faced with threats of retaliatory duties on a wide range of American goods, President Bush cancelled the steel tariffs. In the same month, however, the US announced new tariffs on imports of textiles and television sets from China.
- In 2003 there was one positive step which benefited poorer countries: responding to worldwide protests from states suffering the worst ravages of HIV/AIDS, President Bush agreed that the patents controlling the necessary drugs should be overridden, allowing far cheaper versions to be produced for sale in the worst affected states. There was an ulterior motive, however: in return, the Americans were hoping to gain access to African oil and to set up military bases in strategic parts of the continent.

There was a long way to go before globalization produced a fair and just world in which wealth was more evenly distributed. Some observers believed that the way forward was in a reinvigorated and strengthened UN; others saw the newly enlarged EU as the best hope. The participation of the USA – the world's richest nation – was still thought to be vital. As Will Hutton put it: 'We badly need the better America back – the liberal, outward-looking and generous US that won World War II and constructed a liberal world order that in many respects has sustained us to this day.' South African president Thabo Mbeki summed up the world situation admirably in July 2003 when he wrote: 'The progressive politicians must demonstrate whether they have the courage to define themselves as progressive, recovering their historic character as champions of the poor, and break the icy ideological grip of right-wing politics. The African masses are watching and waiting.' Sadly, what happened next can hardly have been more disappointing for them. The participation of the USA was still very much in evidence, but not quite in the way the commentators hoped for.

27.7 CAPITALISM IN CRISIS

(a) Meltdown – the Great Crash of 2008

On 15 June 2007 Ben S. Bernanke, chairman of the American Federal Reserve Bank, made a long speech in which he extolled the virtues of the American financial system:

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> In the United States, a deep and liquid financial system has promoted growth by effectively allocating capital, and has increased economic resilience by increasing our ability to share and diversify risks both domestically and globally.

There was, he said, no possibility of a financial crisis in America. Yet, little over a year later the American system and the whole global economy seemed to be on the verge of total collapse. In fact some experts had been predicting collapse for some years, but had been proved wrong. However, in March 2008 the unthinkable happened – it was revealed that one of the oldest and most respected Wall Street investment banks, Bear Stearns, was in serious trouble. It had lost $1.6 billion when some affiliated hedge funds collapsed, but much worse, it had a problem with bad debts estimated at $220 billion. Reluctantly, US treasury secretary, Henry Paulson, decided that Bear Stearns could not be allowed to collapse, since that might inconvenience or even ruin many of the rich citizens who had entrusted their wealth to the bank. There was a rule that the US government should never bail out an investment bank, so it was arranged that another bank, J. P. Morgan, should be provided with Federal Reserve funds to enable it to take over Bear Stearns. This indirect Federal Reserve bailout of Bear Stearns saved the system from collapsing. Unfortunately, it also left the impression that any other bank that got itself into difficulties would always be able to rely on a government bailout. In financial circles this was described as 'moral hazard' – the idea that there are some investors who believe that they are 'too big to fail', and who therefore take reckless risks.

The fourth largest bank on Wall Street, Lehman Brothers, had been struggling for over a year with problems of bad debts and a shortage of capital. In August 2008 it too was on the verge of bankruptcy and no other bank was willing to bail it out. In September its European branch based in London was put into administration, but there was wide expectation in the USA that the government would come to the rescue with a Bear Stearns-type deal. But this time there was to be no bailout – Tim Geithner of the Federal Reserve of New York state announced that there was 'no political will' for a Federal rescue. Lehman Brothers was allowed to go bankrupt; it was the largest US company until then ever to go bust. The collapse sent shock waves around the world, and share prices plummeted. Why was Lehman Brothers allowed to collapse? Government and state financial bosses like Paulson and Geithner were determined that there should be no such thing as 'moral hazard' – state takeovers should not become a habit, because it was seen as state capitalism. In a country that almost worshipped free-market capitalism, the idea that private companies and banks should be subsidized or taken over by the government was sacrilege. One leading financier remarked: 'I just think it is disgusting; this is not American.'

Unfortunately, the crisis worsened rapidly and the government found it impossible to maintain its free-market stance. Another struggling investment bank, Merrill Lynch, was taken over by the Bank of America (BOA). Then came the biggest sensation so far: a giant insurance company, American International Group (AIG), asked the government for a loan of $40 billion to stave off bankruptcy. Like the failing investment banks, AIG had too many bad or 'toxic' debts, as they were now being called. The government was in a dilemma: AIG was so big and had done so much business with most of the major financial institutions worldwide, that if it were allowed to collapse the repercussions would be catastrophic. Consequently it was decided that AIG should be bailed out with a government loan of $85 billion, although the state took an 80 per cent stake in the company. In effect, the US government had nationalized AIG, though the word itself was never used.

The UK banking system was already in trouble before the US crisis began, mainly because the Bank of England was reluctant to pump money into the system and failed to reduce interest rates on borrowing. The UK mortgage bank, Northern Rock, which had been forced to reduce its lending because of its own dependence on short-term borrowing (see below (**b**)*3*), collapsed in September 2007. It was eventually nationalized at a cost of

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some £100 billion. In September 2008 Halifax Bank of Scotland (HBOS) was saved from collapse when it was taken over by Lloyds TSB for £12 billion in a deal arranged by British prime minister Gordon Brown. However, its share price fell rapidly, so that only a few weeks later its value had slumped to £4 billion. This brought Lloyds TSB to its knees as well and it too had to be rescued by the government. Royal Bank of Scotland (RBS) was partly nationalized, so that it became 83 per cent taxpayer-owned. Shares in European banks followed suit; Fortis, the huge Dutch–Belgian bank, lost almost half its value in just a few days and was taken into joint ownership by the two governments. In Germany, France, the Irish Republic and Iceland similar bailouts were taking place. And most of this happened in just a few days in September 2008. The situation was exacerbated by millions of ordinary depositors rushing to withdraw their funds from the banks. Lending between banks had more or less dried up because the inter-bank lending rates (known as LIBOR) were prohibitive.

By the time the crisis passed, the US Treasury had acquired stakes in several more major financial institutions, including Goldman Sachs, Morgan Stanley, J. P. Morgan Chase, and two mortgage underwriters, Freddie Mac and Fannie Mae. The function of these last two institutions was not to provide mortgages directly to house-buyers, but to act as an insurance by underwriting mortgages given by other banks. Much of the help was provided under the Bush administration's Troubled Asset Relief Program (TARP) and later by the Obama administration's Public–Private Investment Program. According to an official report in July 2009, TARP had saddled the taxpayers of the USA with a debt of $27.3 trillion. By that time the crisis had developed into a global recession. The whole bailout operation was extremely controversial. President Bush was accused of being un-American and of introducing socialism. To get the TARP approved by Congress it was necessary to attach several conditions: limits on executive pay, a cap on dividends and the right of the government to take stakes in the ailing banks.

(b) What were the causes of the great crash?

Paul Mason, economics editor of the BBC *Newsnight* programme, sums up the causes of the crisis neatly in his book *Meltdown* (2010):

> If you exalt the money-changers, exhort them to make more money and hail the ascendancy of speculative finance as a 'golden age', this is what you get. The responsibility for what happened must lie, as well as with any banker found to have broken the law, with regulators, politicians and the media who failed to hold them up to scrutiny.

He argues that the system known as neo-liberalism that had been in operation for the last quarter of a century was mainly responsible for the catastrophe. In the words of Sir Keith Joseph, a UK Conservative supporter of the free-market system, neo-liberalism involved 'the strict and unflinching control of money supply, substantial cuts in tax and public spending and bold incentives and encouragements to the wealth creators'.

Beginning in the last decade of the twentieth century, globalization played an important role, as national economies became interlinked as never before. In the 20 years after 1990 the world's labour force doubled and with the increase in migration, became global. China and the former Soviet bloc joined the world economy. The greater availability of labour brought a fall in real wages in the leading western economies, including the USA, Japan and Germany. Yet consumption grew, made possible by a massive increase in credit and the heyday of the credit-card era. The credit boom seemed sustainable at first but after 2000 the debts began to run out of control. At the same time capital flowed around as western financiers began to invest abroad more than ever before, and this caused a huge rise in

global imbalances. For example, China's foreign currency reserves grew from $150 billion in 1999 to $2.85 trillion in 2010; but between 1989 and 2007 the US deficit increased from $99 billion to $800 billion. So long as the US housing boom continued, the situation was just about sustainable, but once house prices began to falter, chaos was unleashed as the amount of toxic debts soared. To look at the steps towards meltdown in more detail:

1 *The deregulation of the US banking industry in 1999–2000*

In November 1999 the US Congress passed an act designed to promote economic growth through competition and freedom. This cancelled the regulation, dating from the Depression of the 1930s, that prevented investment banks from handling the savings and deposits of the general public, and meant that they now had access to far larger funds. Banks were also allowed to act as insurance companies. A year later futures and all other derivatives were exempted from being classified as gambling and all attempts to regulate the derivatives market were declared illegal. Probably the most common type of derivatives are futures: a future is a contract in which you agree to buy something at a future date, but at a price decided on now. The hope is that in the meantime the price will go up, enabling you to sell it again at a profit. The actual contract between the two parties can itself be sold and resold several times before the agreed date. However, there is a risk involved: in the meantime the price might fall, but you still have to pay the agreed price. Another type of derivative develops when observers start betting among themselves on whether the original contract will be fulfilled. The option derivative is similar to a future except that you simply agree the option to buy, rather than actually buying the commodity itself.

The deregulation, together with the spread of the latest computer technology, was certainly a 'bold incentive and encouragement' to the bankers who now had a free hand to indulge in all these types of speculation. It enabled the derivatives market to become global, and foreign-exchange dealing increased rapidly. In the two years leading up to the crash, there was a massive rush of money into derivatives and currency trading. The statistics are staggering: in 2007 the total value of the world's stock market companies was $63 trillion; but the total value of derivative investments stood at $596 trillion – eight times the size of the real economy. It was as though there were two parallel economies – the real economy and a kind of phantom or fantasy economy which only existed on paper. Admittedly, not all the derivative dealings were speculative, but enough of them were risky to cause concern among perceptive financiers. As early as 2002 Warren Buffett, probably the world's most successful investor, warned that derivatives were a time bomb, financial weapons of mass destruction, because in the last resort, neither banks nor governments knew how to control them. Paul Mason concludes that since the end of the 1990s, 'this new global finance system has injected gross instability into the world economy'. By October 2008, even Alan Greenspan, a former chairman of the Federal Reserve, who had always claimed that banks could be trusted to regulate themselves, was forced to admit that he had been wrong. By the time the crisis peaked, some 360 banks had received capital from the US government.

2 *Sub-prime mortgages and the collapse of the US housing market*

The long-running housing boom in the USA reached a peak towards the end of 2005. House prices had been rising steadily and had reached levels that could not be sustained. Too many houses had been built, demand gradually fell and so did prices. The unfortunate thing was that many houses, especially during the latter stages of the boom, had been bought using sub-prime mortgages. These are mortgages lent to borrowers who have a high risk of being unable to keep up the payments, and for that reason sub-prime borrowers have to pay a higher interest rate. As house prices were rising, mortgage providers were able to repossess houses whose buyers defaulted on their mortgage payments, and make a

profit from selling them on. When house prices began to fall, many lenders foolishly continued to push sub-prime mortgages, and suffered heavy losses when the buyers defaulted. The more careful mortgage providers took out insurance to underwrite their loans, so insurance companies like AIG, Freddie Mac and Fannie Mae were faced with huge payouts. Niall Ferguson, in one of his 2012 Reith Lectures, suggested that Freddie and Fannie should take a large slice of the blame for the crisis, because they encouraged people who really couldn't afford to do so to take out mortgages.

Another of the practices that contributed to the meltdown was known as collateral debt obligation (CDOs). This was the packaging together of different debts and bonds for sale as assets; a package might include sub-prime mortgages, credit-card debts and any kind of debt, and anybody buying the package would hope to receive reasonable interest payments. In fact since the year 2000, buyers, which included investment banks, pension funds and building societies, had been receiving interest payments on average between 2 and 3 per cent higher than if the debts had not been bundled up. But then several things went wrong – houses prices fell by around 25 per cent, more people defaulted on the mortgage payments than had been expected, unemployment rose, and many people were unable to pay off their credit-card debts. One estimate put the likely losses to buyers at $3.1 trillion.

3 Leverage, short selling and short-termism

These were other tactics in which banks indulged in order to make money, and which eventually ended in disaster. Leverage is using borrowed money to increase your assets which can then be sold at a profit when the value increases. Lehman was guilty of this, having a very high leverage level of 44. This means that every $1 million owned by the bank had been stretched by borrowing so that they were able to buy assets valued at $44 million. In a time of inflation like the period 2003–6, these assets could be sold at a comfortable profit. But it was gamble, because only a small downward movement in the value of the assets would be enough to break the bank. As John Lanchester explains:

> Lehman made gigantic investments in the property market, not just in the now notorious sub-prime mortgages, but also to a huge extent in commercial property. In effect, Fuld [Richard Fuld, head of Lehman Brothers] allowed his colleagues to bet the bank on the US property market. We all know what happened next.

As US house prices collapsed and the number of mortgage defaulters soared, Lehman was left with debts of $613 billion. In the words of Warren Buffett: 'when the tide goes out it reveals those who are swimming naked'.

Short selling is a strange process in which the investor first borrows, for a fee, shares from a bank or other institution which is not planning to sell the shares itself. The investor then sells the shares in the hope that their price will fall. If and when this happens, he buys the shares back, returns them to the owner and keeps the difference. It is the company whose shares are being sold and bought that suffers, as illustrated by the plight of Morgan Stanley. As the crisis deepened investors began to move their money out. In three days 10 per cent of the cash on Morgan Stanley's books was withdrawn. The share price began to fall and this was the signal for short sellers to unload their Morgan Stanley shares, sending the share price plunging further.

Short-termism is the common banking practice of lending money for long terms and borrowing it for short terms – you issue a long-term loan and fund it by short-term borrowing yourself. When lending between banks dried up in September 2008 following the rush of depositors to withdraw cash, many banks were unable to pay out. This was because they had lent too much out on long-term loans which they could not get back immediately, and had failed to keep to the rule that they must hold a large enough 'cushion' to fall back on.

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Many banks tried to get round this regulation by setting up a sort of 'shadow' banking system. Paul Mason explains how the system worked:

> The essence of the shadow banking system is that it is designed to get round the need for any capital cushion at all. Almost everybody in the shadow system was 'borrowing short' by buying a piece of paper on the vast international money market, and then 'lending long' by selling a different piece of paper into that same money market. So it was basically just traditional banking: but they were doing it with no depositors, no shareholders and no capital cushion to fall back on. They were pure intermediaries. They did it by exploiting a loophole in the regulations to create two kinds of off-balance sheet companies known as 'conduits' and 'structured investment vehicles' (SIVs). ... The conduits were set up by banks in offshore tax havens. The bank would, theoretically, be liable for any losses, but it did not have to show this on its annual accounts.

Incredible as it may seem, all this was kept secret from investors, which didn't matter when all was running smoothly. But there was one huge flaw in the system: it could only work as long as bankers continued to buy and sell everything on offer. As soon as short-term credit was no longer available, bankers could not fund their long term loans, and inevitably some pieces of paper became unsaleable.

4 Regulators and credit-rating agencies failed to do their job satisfactorily

Since 2000, thanks to the actions of both the US and UK governments, regulation of the banking system had been exercised with what can only be described as a light touch. The politicians were apparently happy to continue this non-interventionist attitude since bankers had played an important part in achieving the consumer boom and full employment. They mistakenly believed that bankers could therefore be trusted not to do anything too risky. The credit-rating agencies were the second line of defence against high risk. The three main agencies are Standard and Poor's, Moody's and Fitch. Their job is to carry out a risk-assessment process on banks, companies and assets and award grades showing investors whether or not it would be safe to do business with them. The safest gets an AAA rating, while BB or less indicates a high-risk institution or commodity. Between 2001 and 2007 the amount of money paid to the three main credit rating agencies doubled, reaching a total of $6 billion. Yet an official report published in July 2007 was highly critical of the work of the rating agencies. They were accused of being unable to show convincing evidence that their methods of assessment were reliable, especially in the case of CDOs. They were unable to cope with the vast increase in the amount of new business that they were called on to do since 2000. Many critics saw the whole system as suspect: the fact that institutions and sellers of bonds actually paid for their own ratings invited 'collusion'; if they gave the correct ratings, they risked upsetting the banking business and losing market share. As a result, no decisive action was taken until it was too late. For example, it was only a matter of hours before the British HBOS collapsed in September 2008 that Standard and Poor's downgraded it, and even then the comforting phrase, 'but the outlook is stable', was added.

(c) The aftermath of the crash

Although the capitalist financial system had been saved from total collapse, the consequences of the crisis were clearly going to be felt for a long time. As the money supply dried up, demand for goods fell, and across the world, manufacturing industry slumped. Many of the weakest companies went to the wall and unemployment rocketed. In the USA in the first few months of 2009 it was calculated that around half a million jobs a month were being lost. The great exporting nations like China, Japan, South Korea and Germany

suffered huge falls in exports. Although central bank interest rates were almost zero in the USA and Britain, nobody was investing to try to stimulate the still declining economy. Attempts to deal with this problem included:

- Fiscal stimulus provided by governments and central banks. As early as November 2009 the Chinese government had decided to supply cash worth $580 billion over the next two years to fund various environmental projects. Banks were encouraged to lend vast sums of money, guaranteed by the state, to fund other projects. Millions of new jobs were created, and within a few months China's economic growth rate had recovered and surpassed its previous high point. The main problem was the uncertainty about how risky those massive bank loans were.

  In the USA, newly elected Democrat president Barack Obama's fiscal stimulus of $787 billion went into operation in February 2009. It was a controversial move because the Republican party was totally against it; even in a crisis as serious as this, they believed that the state should not be expected to provide help. A right-wing Republican group calling themselves the Tea Party Movement launched an anti-stimulus protest campaign encouraging Republican state governors not to accept stimulus money. Although the US economy did begin to grow again towards the end of 2009 and continued slowly through 2010, there were still 15 million unemployed at the end of the year.

  In the EU the effects of the crisis varied among its 27 member states. They experienced different degrees of recession, though the average growth reduction at the end of 2009 was 4.7 per cent. The three Baltic states fared the worst, suffering full-scale slump: Estonia's GDP fell by 14 per cent, Lithuania's by 15 per cent and Latvia's by 18 per cent. France did best, losing only 3 per cent of GDP. Most states borrowed heavily in order to launch fiscal-stimulus packages. For example, in 2009 France's borrowing was equivalent to 8 per cent of GDP and Britain's was 11 per cent. These amounts were quite small compared with America's and China's, but in the case of France they were successful: as early as August 2009 the French economy was growing again. The problem was that they were all left with massive national debts. Those countries which had signed up to the Maastricht Agreement of 1991 (see Section 10.4(h)) had broken the rules that borrowing must not exceed 3 per cent of GDP and total debt must be limited to 60 per cent of GDP.
- Quantitative easing (QE). This was the practice, first thought of by John Maynard Keynes back in the 1930s, of increasing the amounts of cash in circulation by 'printing money'. In fact nowadays banks do not actually print new notes; the central banks simply invent or create more money which is added into their reserves, and then used to buy up government debts. The UK was the first to use QE in March 2009 when a modest £150 billion was 'created', and this to some extent helped to put demand back into the system. According to Paul Mason, 'Britain's "pure" QE strategy saw it inject around 12 per cent of GDP into the economy. The Bank of England estimates this should, over a period of three to four years, filter through into a 12 per cent increase in the money supply and thus in demand.' The USA adopted QE soon after Britain. However, the European Central Bank rejected QE on the grounds that it would threaten the stability of the euro. It was argued that simply making more of the existing money available to eurozone banks and buying AAA-rated bonds would be sufficient to stimulate demand. But demand was not sufficiently stimulated and consequently the value of the euro was weakened. By the end of 2009 the eurozone was in big trouble as the cost of all the fiscal stimulus and bank bailouts had to be faced. Some economists were already predicting that the zone was on the verge of break-up. In fact some economists and politicians *hoped* it would break up, so this seemed an unmissable opportunity!

(d) The eurozone in crisis

The financial crisis in Greece sparked things off. In October 2009 the newly elected social-democrat government discovered that the country's budget deficit – which stood at 6 per cent according to the previous government – was in reality 12.7 per cent. Over half its actual debt, with a little assistance from Goldman Sachs, had been moved into the shadow-banking system, 'off balance sheet'. It later emerged that there were serious flaws in the Greek system that had allowed massive tax evasion and other corrupt practices, such as pensions still being paid to families of the deceased. The immediate problem was that Greece had financed its national debt with short-term loans, a quarter of which were due for repayment in 2010. How were they going to find the necessary €50 billion? The first step was to introduce strict austerity policies – cuts in pensions, wages and social services and a campaign to eliminate tax evasion. Eventually in May 2010 the eurozone banks and the IMF agreed a loan of €110 billion to Greece, provided they fulfilled the austerity programme. This was extremely unpopular with the Greeks, and resulted in strikes and two general elections over the next two years. By the autumn of 2011 there seemed a real danger that Greece would default on its debts. Worried about the disastrous effects this might have on other members of the eurozone, leaders agreed to write off half of Greece's debts to private creditors.

Meanwhile some other eurozone countries had also got themselves too heavily in debt. In November 2011 the Republic of Ireland had to be helped with a bailout of €85 billion. Portugal, which had suffered crippling competition from Germany and China, was on the verge of bankruptcy. In July 2011 Moody's had downgraded Portugal's debt to 'junk' status, and in October it too received an IMF bailout. Portugal had the lowest GDP per capita in western Europe and in March 2012 the unemployment rate was around 15 per cent. By August 2011 Spain and Italy had drifted into the danger zone. Paul Mason explains what happened next (in *Why It's Kicking Off Everywhere: The New Global Revolutions* (2012)):

> The European Central Bank was forced to break its own rules and start buying up the debt of these two massive, unbailable economies. The dilemma throughout the euro crisis has been clear: whether to impose losses from south European bad debts onto north European taxpayers, or onto the bankers who had actually lent the money to these bankrupt countries in the first place. The outcome was always a function of the level of class struggle. By hitting the streets, Greek people were able to force Europe to impose losses on the bankers; where opposition remained within traditional boundaries – the one-day strike, the passive demo – it was the workers, youth and pensioners who took the pain. Meanwhile Europe itself was plunged into institutional crisis. Monetary union without fiscal union had failed.

27.8 THE WORLD ECONOMIES IN 2012

At the turn of the millennium 'globalization' had been the buzzword. It seemed to promise huge benefits for the world – increased connectivity between countries, faster growth, greater transfer of knowledge and wealth, and perhaps even a fairer distribution of wealth. Economists talked about the 'BRIC' countries, meaning Brazil, Russia, India and China. These were the world's fastest growing and largest emerging market economies, and between them they contained almost half the world's population. Many economists were predicting that it was only a matter of time before China became the largest economy in the world, probably some time between 2030 and 2050. Goldman Sachs believed that by 2020 all the BRIC countries would be in the world's top 10 economies, and that by 2050

they would be the top four, with China in first place. The USA was expected to have been relegated to fifth place.

There were differing views about actual details of how this scenario would play out. In 2008 the BRIC countries held a summit conference. Many analysts got the impression that they had ulterior motives of turning their growing economic strength into some kind of political power. They could carve out the future economic order between themselves. China would continue to dominate world markets in manufactured goods, India would specialize in providing services, while Russia and Brazil would be the leading suppliers of raw materials. By working together in this way the BRIC states can present an effective challenge to the entrenched interests and systems of the West. However, the fact that these four countries have very little in common could mean that any economic and political co-operation would only be temporary, or rather artificial. Once China becomes the world's largest economy, it might not need the other three. In that case it could be China and the USA that work together to lead the global economy.

It was not immediately obvious how the 2008 meltdown would affect the BRIC nations. Many economists believed it would be possible for them to 'decouple' themselves from the West and continue growing. This turned out not to be the case and many commentators began to doubt whether globalization had been a 'good thing' after all. It seemed as if it had made the world economy less stable, more volatile, and more vulnerable to the danger of a crisis in one country infecting the rest of the world. A brief survey of the world's leading states shows that, unfortunately, very few were able to avoid the contagion. As a report from Crédit Suisse said: 'We may not be at the brink of a new global recession, but we are even less likely to be at the threshold of a global boom.'

(a) China

As we saw earlier, the financial crisis of 2008 caused an immediate drop in China's exports. China launched a great spending spree in 2008 and 2009 to improve the country's infrastructure and launch a number of environmental projects. This seemed to work at first and China's growth rate soon recovered. However, this policy was continued through 2010 and 2011 when the total investment was an unprecedented 49 per cent of China's GDP. There were several problems with this state of affairs. Most observers believed that there was a limit to the number of roads, airports and high-rise flats that China could keep on building, and they feared that there had been an unsustainable building bubble that was about to burst, just as similar bubbles burst earlier in the USA, Spain and Portugal. The concentration on domestic consumption and reduced demand from overseas meant that exports, and therefore revenue from exports, were continuing to decline, and the growth rate was slowing. The Chinese themselves were extremely nervous about their own vulnerability in view of the continuing crisis in the eurozone. So much so that in June 2012, along with India, they contributed tens of billions of dollars to the IMF's emergency fund for tackling the EU's ongoing problems.

(b) Brazil

Like China, Brazil initially responded well to the 2008 economic crisis, launching a massive property-building project. This created thousands of new jobs and unemployment fell to its lowest level for many years. Domestic demand continued at a high level. The economy continued to grow, receiving a huge boost with the discovery of more oil and gas reserves off the coast. By 2012 Brazil had become the world's ninth largest oil producer, and was hoping eventually to become the fifth largest. It had overtaken Britain and was

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now rated to be the sixth largest economy in the world. Other good news was that poverty was decreasing – over the last few years, the incomes of the poorest 50 per cent of the population have increased by almost 70 per cent. Brazil will host the 2014 soccer World Cup and the 2016 Summer Olympics will take place in Rio de Janeiro.

However, the latest reports suggest that all is not well in Brazil. House prices in Rio have trebled since 2008, causing mortgage borrowing to rocket and raising the prospect of yet another crash if and when the housing bubble should burst. Since some of Brazil's main exports included raw materials and oil to China, the slow-down in Chinese exports of manufactured goods and the general decline in global demand did not bode well for Brazil's export trade, especially taking into account the 30 per cent fall in oil prices. Domestic demand fell as consumer confidence waned, and all the analysts were predicting a dramatic slowdown in growth.

(c) India

India's economy had been expanding rapidly and words like 'dynamic' and 'rampaging Asian tiger' had been used to describe it. However, as the financial crisis hit the USA and Europe, demand for Indian goods plummeted and was still falling in 2012. In fact, Indian exports fell by a further 3 per cent in the year from May 2011 to May 2012. As the economy slowed down, investors began to desert India, preferring something safer, like the US dollar. This sent the value of the rupee plunging until in June 2012 it reached a record low against the dollar. In theory this should help Indian exports, which would be cheaper; but on the other hand it made India's imports more expensive, and this pushed up the cost of living, making even essentials difficult to afford. In addition India had further problems: much of its infrastructure was in a dilapidated state, and businesses complained of being hampered by corruption, bribery and unnecessary bureaucracy. The country's current account deficit stood at $49 billion in June 2011 and was estimated to be $72 billion at the end of 2012, which would be over four per cent of India's GDP. According to Morgan Stanley, a sustainable deficit ought to be no more than two per cent of GDP. Standard and Poor's and Fitch both reduced their ratings of the Indian economy to 'negative', though Moody's continued to rate it as 'stable'. Clearly India had failed to 'decouple' itself from the problems of the eurozone. Desperate for the eurozone crisis to be resolved, in June 2012 India joined China in making a substantial contribution to the IMF's emergency fund.

(d) Russia

Up until 2008 the Russian economy enjoyed ten years of spectacular growth thanks mainly to high oil prices. GDP increased tenfold, and by 2008 revenues from oil and gas were worth around $200 billion, about one-third of total revenue. The fact that the economy was so dependent on the price of oil meant that there could be no 'decoupling' from the rest of the world's economic problems. The rapid fall in oil prices and in demand for oil had a disastrous effect on Russia: in 2008 the price per barrel plunged from $140 to $40, causing a drastic fall in revenue. The foreign credits that Russian banks and businesses had relied on quickly dried up, leaving many firms unable to pay their debts. The government was forced to help them by providing $200 billion to increase liquidity in the Russian banking sector. The Russian Central Bank also spent a third of its $600 billion international currency reserve fund to slow down the devaluation of the rouble. Fortunately, by the middle of 2009 the slump had bottomed out and the economy began to grow again. In 2011, as well as becoming the world's leading oil producer, surpassing Saudi Arabia, Russia also became the second largest producer of natural gas and the third largest

exporter of steel and aluminium. The high price of oil in 2011 helped the recovery and enabled Russia to reduce the large budget deficit that had accrued during the lean period in 2008 and early 2009.

However, recognizing the danger of being too dependent on oil, the government successfully encouraged the expansion of other areas. In 2012 Russia was the world's second largest producer of armaments, including military aircraft, after the USA, and the IT industry had a year of record growth. Companies making nuclear power plants were expanding, and several plants were exported to China and India. In 2012 statistics showed that Russia was the third richest country in the world in terms of cash reserves; inflation had been reduced and unemployment had fallen. Nor was the expansion confined to Moscow and St Petersburg; other cities, including Nizhny Novgorod, Samara and Volgograd (formerly Stalingrad), were playing an important role in the diversification of industry. Of the four BRIC nations Russia was clearly the strongest economically.

(e) The USA

Unemployment, which had stood at 15 per cent at the end of 2010, continued to fall, but only slowly. Fitch ratings agency estimated that President Obama's fiscal stimulus packages boosted US GDP by 4 per cent over the following two years. However, according to a *Guardian* report (27 June 2012), 'the US economy is still limping along with very slow growth and a high rate of unemployment. Although the economy has been expanding for three years, the level of GDP is still only 1 per cent higher than it was nearly five years ago. Recent data shows falling real personal incomes, declining employment gains, and lower retail sales.' Another problem was that, although mortgage interest rates were low, house prices have continued to fall and in 2012 were 10 per cent lower in real terms than they were two years ago.

At the end of June 2012 the Organization for Economic Co-operation and Development (OECD), the Paris-based group of independent economists from 34 countries, produced its biannual report on the US economy. This confirmed that the US recovery remained fragile and pointed out that two of the main problems were record long-term unemployment and the widening gap between the poor and the wealthy. About 5.3 million Americans, 40 per cent of unemployed people, have been out of work for six months or more. Poverty in the US is worse than in Europe, and of the 34 OECD member states, only Chile, Mexico and Turkey rank higher in terms of income inequality. The report also suggested measures to remedy the situation:

- Equalize tax rates by ending tax breaks for the very wealthy – in other words, make the rich pay more. Earlier in 2012 the government proposed a measure to make sure that everyone making more than a million dollars a year pays at least 30 per cent in tax. Predictably, this was strongly opposed by the Republicans.
- Provide more investment for education and innovation, and more training programmes to get the long-term unemployed back to work.
- Increase gas prices to help reduce the use of fossil fuels.
- The government should reduce spending, but only gradually, rather than make drastic cuts; these might discourage business investment and slow growth even further.

How the situation would develop depended very much on the results of the presidential and congressional elections held in November 2012. Tax cuts for the wealthy introduced during the Bush administration were due to end on 31 December 2012. Another hangover

from the Bush era was that automatic spending cuts would be applied at the end of 2012. The cuts involved, dubbed 'the fiscal cliff', would amount to $1.2 trillion.

(e) The European Union

In the summer of 2012 the future looked uncertain. In June there were tense elections in Greece when the party that was prepared to continue the austerity policy won a narrow victory over the socialist party that resented having austerity forced on the country by outsiders, and was determined to abandon the euro. And so the euro survived again. There was also resentment in some of the more economically successful north European states, especially in Germany, at having to bail out what many saw as the 'feckless, reckless and lazy' south. The most likely outcome seemed to be that the taxpayers of northern Europe would bail out the south and would, in effect, take control of overall eurozone economic policy, so that the eurozone would become much closer to being a fiscal union, and therefore, to some extent, a political union as well. Of course the governments of southern Europe resisted losing overall control of their economic policies; but without a bailout of some sort – the eurozone seemed likely to disintegrate.

On the other hand, many economists and financiers believed that the euro must be saved. In September 2012 Mario Draghi, the president of the European Central Bank (ECB), announced: 'We say that the euro is irreversible. So, unfounded fears of reversibility are just that – unfounded fears.' It was felt that the collapse of the euro would throw the entire global economy into chaos. Certainly Germany wanted the euro saved, because the cheap euro benefited German exports, whereas a strong Deutschmark would do considerable damage to their exports. Hopes for the survival of the euro revived in September 2012 when Mario Draghi unveiled a rescue plan that involved the ECB buying up the bonds of Spain and Italy, the two eurozone countries after Greece most heavily in debt. Those governments could then request a bailout from the ECB which would be granted, provided they agreed to implement strict austerity measures. The announcement of the plan received a glowing reception across most of Europe; stock markets soared on both sides of the Atlantic, and so did confidence in the euro's survival. This was sufficient to bring down borrowing costs for Spain and Italy, and their future seemed brighter. Even the Germans agreed to go along with the scheme. At first the German Bundesbank condemned the whole idea as 'tantamount to financing governments by printing banknotes'. But eventually, after pressure from Chancellor Merkel and Mario Draghi himself, followed a few days later by the approval of the German constitutional court, the Bundesbank, albeit rather grudgingly, agreed to back the plan. The European Stability Mechanism (ESM), as it was now known, was poised to go into operation with the creation of a rescue fund of €500 billion.

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QUESTIONS

1 What is meant by the term 'North–South divide'? What attempts have been made since 1980 to close the gap between North and South, and how successful have they been?
2 Assess the reasons why global warming is seen as such a serious problem for the world's future. To what extent do you think it is the twenty-first century's major problem?
3 Explain why there was a 'crisis of capitalism' in the decade leading up to 2012.

There is a document question about pollution and global warming on the website.

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Chapter

28 The world's population

SUMMARY OF EVENTS

Before the seventeenth century the world's population increased very slowly. It has been estimated that by 1650 the population had doubled since the year AD 1, to about 500 million. Over the next 200 years the rate of increase was much faster, so that by 1850 the population had more than doubled to 1200 million (1.2 billion). After that, the population growth accelerated so rapidly that people talked about a population 'explosion'; in 1927 it reached the 2 billion mark. By the year 2000 it had passed 6 billion and at the end of 2011 it reached 7 billion. In 2003 the UN calculated that if the population continued to increase at the same rate, the global total would be somewhere between 10 billion and 14 billion by 2050, depending on how effectively family planning campaigns were carried out. It was also estimated, given the much lower birth rates in the developed world, that almost 90 per cent of the people would be living in the poorer countries. During the 1980s the spread of HIV/AIDS reached pandemic proportions; most countries in the world were affected, but again it was the poor nations of the Third World which suffered worst. This chapter examines the causes of the population 'explosion', the regional variations, the consequences of all the changes, the attempts at population control and the impact of AIDS.

28.1 THE INCREASING WORLD POPULATION SINCE 1900

(a) Statistics of population increase

It is easy to see from the steeply climbing population total in Figure 28.1 why people talk about a population 'explosion' in the twentieth century. Between 1850 and 1900 the world's population was increasing, on average, by 0.6 per cent every year. During the next 50 years the rate of increase averaged 0.9 per cent a year; it was after 1960 that the full force of the 'explosion' was felt, with the total world population increasing at the rate of 1.9 per cent a year, on average. In 1990 the population was increasing by roughly a million every week, and the total had reached 5300 million. In 1994 there was an increase of 95 million, the biggest ever increase in a single year so far. In 1995 the record was broken again, as the total population grew by 100 million to 5750 million. According to the Population Institute in Washington, 90 per cent of the growth was in poor countries 'torn by civil strife and social unrest'. During 1996 a further 90 million were added to the population, and by 2000 the global total was well past 6 billion. It topped the 7 billion mark at the end of 2011.

However, there were important regional variations within the general population increase. Broadly speaking, the industrialized nations of Europe and North America had their most rapid increase before the First World War; after that their rate of increase slowed considerably. In the less developed, or Third World nations of Africa, Asia and Latin America, the rate of population increase accelerated after the Second World War,

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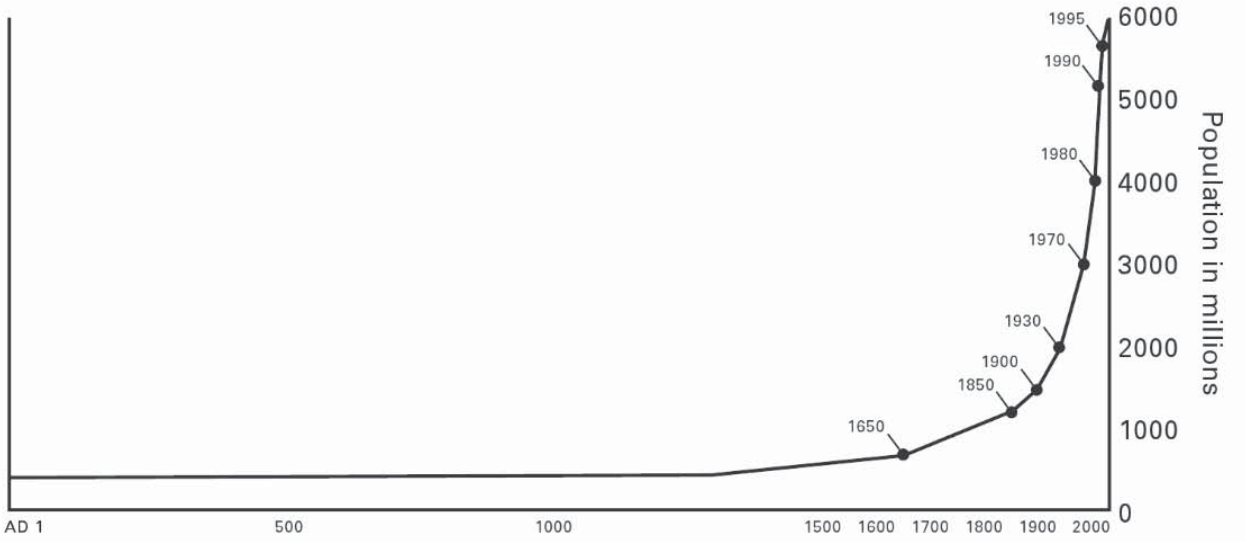
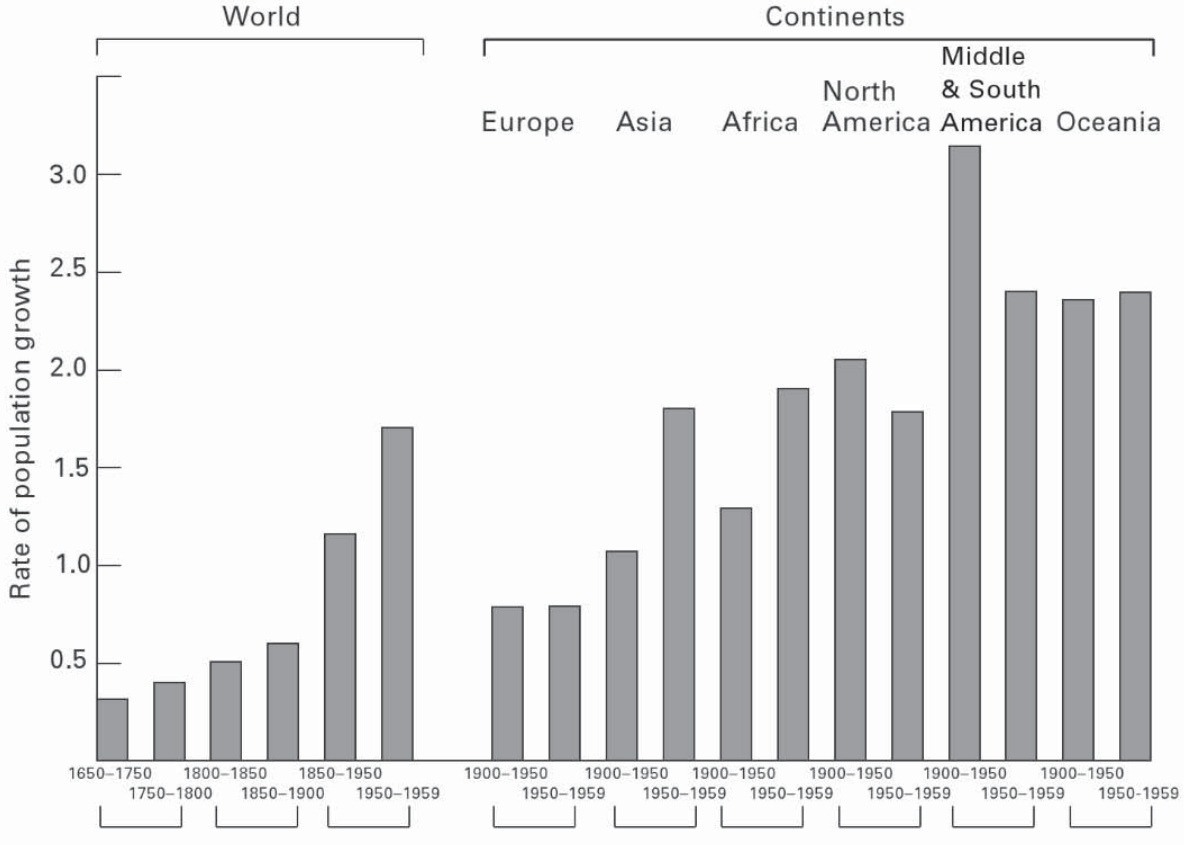


Figure 28.1 **World population increases from AD 1 to 1995**

and it was in these areas that population growth caused the most serious problems. The growth rate began to slow down in some Latin American countries after 1950, but in Asia and Africa the rate continued to increase. Figure 28.2, which is based on statistics provided by the United Nations, shows:

1 The percentage rates at which the world's population grew between 1650 and 1959.
2 The percentage rates of population increase in the different continents during the periods 1900–50 and 1950–9.



Source: 'The Determinants and Consequences of Population Trends', *UN Statistical Yearbook 1960*

Figure 28.2 **Rate of population growth by regions**

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(b) Reasons for the population increase

The population increase in Europe and North America in the later part of the nineteenth and the early twentieth centuries had several causes.

- Increasing industrialization, economic growth and prosperity meant that the necessary resources were available to sustain a larger population, and the two seemed to go hand in hand.
- There was a great improvement in public health, thanks to advances in medical science and sanitation. The work of Louis Pasteur and Joseph Lister in the 1860s on germs and antiseptic techniques helped to reduce the death rate. At the same time, the big industrial cities introduced piped water supplies and drainage schemes, which all helped to reduce disease.
- There was a decline in infant mortality (the number of babies who died before the age of 1). Again this was mainly thanks to medical improvements, which helped to reduce deaths from diseases such as scarlet fever, diphtheria and whooping cough, which were so dangerous to young babies. The improvement in some countries can be seen in Table 28.1, which shows how many babies per thousand born, died within their first year.
- Immigration helped to swell the population of the USA and, to a lesser extent, some other countries on the continents of America, such as Canada, Argentina and Brazil. In the 100 years after 1820, some 35 million people entered the USA; in the last few years before 1914 they were arriving at a rate of a million a year (see Section 22.2).

After 1900 the growth rate in Europe began to slow down, mainly because more people were using modern contraceptive techniques. Later, the economic depression of the 1930s discouraged people from having as many children.

The rapid population growth after 1945 in Third World countries had three main causes:

- *Modern medical and hygiene techniques* began to make an impact for the first time; the child mortality rate fell and people lived longer, as killer diseases like smallpox, malaria and typhoid were gradually brought under control.
- *At the same time, the vast majority of the population made no attempt to limit their families by using contraceptives.* This was partly through ignorance and partly because contraceptives were too expensive for ordinary people to buy. The Roman Catholic Church said that contraception was forbidden for its members, on the grounds that it prevented the natural creation of new lives, and was therefore sinful. Since the Roman Catholic Church was strong in Central and South America, its teaching had important effects. The population growth rate for many countries in these areas was over 3 per cent per annum. The average for the whole of Latin America was 2.4 per cent in 1960, whereas the average for Europe was only 0.75 per cent. *An increase of 2 per cent per annum means that the population of that*

Table 28.1 **Deaths within one year of birth, per thousand births**

	England	*Switzerland*	*France*	*Italy*	*Austria*
1880–90	142	165	166	195	256
1931–38	52	43	65	104	80

country doubles in about 30 years. This happened in Brazil and Mexico in the 30 years up to 1960.

- Many Third World countries have a long tradition of people *having as many children as possible to combat high infant mortality*, in order to make sure their family continues. Some cultures, Muslims, for example, attach great value to having many sons. The same attitudes persisted in spite of the reduction in infant mortality.

28.2 CONSEQUENCES OF THE POPULATION EXPLOSION

(a) The industrializing nations of Europe and North America

The population growth of the nineteenth century helped to stimulate further economic development. There was a plentiful workforce and more people to buy goods, and this encouraged more investment and enterprise. Nor were there any great problems about feeding and educating these growing numbers, because prosperity meant that the necessary resources were available. Later on, there were unexpected effects on the age structure of the population in the developed nations. This was especially true in Europe where, because of the very low birth rates and longer life expectancy, a growing proportion of the population was over 65. By the 1970s, in countries such as Sweden, France and Britain, about 15 per cent of the population were over 65. In the early 1990s, with this proportion still increasing, questions were being asked about whether state welfare systems would be able to afford to pay pensions to all old people if this trend continued into the twenty-first century.

(b) The Third World

The rapid population growth caused serious problems: some countries, like India, Pakistan and Bangladesh, became overcrowded and there was insufficient land to go round. This forced people to move into towns and cities, but these were already overcrowded and there were not enough houses or jobs for all the new arrivals. Many people were forced to live on the streets; some cities, especially those in Latin America, were surrounded by shanty-towns and slums which had no proper water supply, sanitation or lighting.

(c) It became increasingly difficult to feed the population

All areas of the world succeeded in increasing their food production during the late 1960s and 1970s, thanks to what became known as the 'green revolution'. Scientists developed new strains of heavy-cropping rice and wheat on short, fast-growing stems, helped by fertilizers and irrigation schemes. For a time, food supplies seemed to be well ahead of population growth; even a densely populated country like India was able to export food, and China became self-sufficient. In the USA crop yields increased threefold between 1945 and 1995, and the Americans were able to export surplus crops to over a hundred countries. However, in the mid-1980s, with the world's population growing faster than ever, the 'green revolution' was running into problems and scientists became concerned about the future.

- A point had been reached beyond which crop yields could not be increased any further, and there was a limit to the water supply, topsoil and phosphates for fertilizers (see Section 27.4(a)).

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- A survey carried out by scientists at Stanford University (California) in 1996 found that the amount of farmland available was dwindling because of industrialization, the spread of cities and soil erosion. They calculated that the number of mouths to feed in the USA would double by 2050.

There seemed no way in which food production could be doubled from less land. In 1996, on average there were 1.8 acres of cropland to each American and the US diet was made up of 31 per cent animal products. By 2050 there was likely to be only 0.6 of an acre per head. The Stanford scientists came to the conclusion that the solution was for people everywhere to eat less meat; it was suggested that by 2050 the US diet would probably be about 85 per cent vegetarian. Matters were made worse in parts of Africa (Ethiopia, Angola, Mozambique and Somalia) during the 1980s and 1990s by drought and civil wars, which played a part in causing severe food shortages and tens of thousands of deaths from starvation.

(d) Resource shortages in the Third World

Third World governments were forced to spend their valuable cash to feed, house, and educate their growing populations. But this used up resources which they would have preferred to spend on industrializing and modernizing their countries, and so their economic development was delayed. The general shortage of resources meant that the poorest countries also lacked sufficient cash to spend on healthcare. Following a meningitis epidemic in the African state of Niger, Save the Children reported (April 1996) that one-sixth of the world's population – over 800 million people – had no access to healthcare. Health systems in many poorer countries were collapsing, and the situation was becoming worse because richer countries were reducing aid. The report estimated that it cost at least $12 a person a year to provide basic healthcare; but 16 African countries (including Niger, Uganda, Zaire, Tanzania, Mozambique and Liberia) plus Bangladesh, India, Pakistan, Nepal and Vietnam were spending much less than that. In comparison, Britain was spending the equivalent of $1039 (£723). In fact Zaire was spending only 40c per head a year, while Tanzania managed 70c. This meant that simple immunization against easily preventable diseases was not being carried out in these countries. Widespread epidemics could be expected before the end of the century, and a rise in the child mortality rate. When the AIDS epidemic spread, around the turn of the century, it was clear that Africa in particular would be in dire crisis. Another disturbing fact was that almost all these states were spending vastly more per head on defence than on healthcare.

28.3 ATTEMPTS AT POPULATION CONTROL

For many years people had been giving serious thought to the question of controlling the population before the world became too overcrowded and impossible to live in. Soon after the First World War, scientists in a number of countries first began to be concerned at the population growth and felt that it was a problem that should be studied at international level. The first *World Population Congress* was held in Geneva in 1925, and the following year an *International Union for the Scientific Study of Population* was set up in Paris. As well as scientists, the organization also included statisticians and social scientists who were concerned about the probable economic and social effects if the world's population continued to grow. They did valuable work collecting statistics and encouraging governments to improve their data systems, so that accurate information about population trends could be collected.

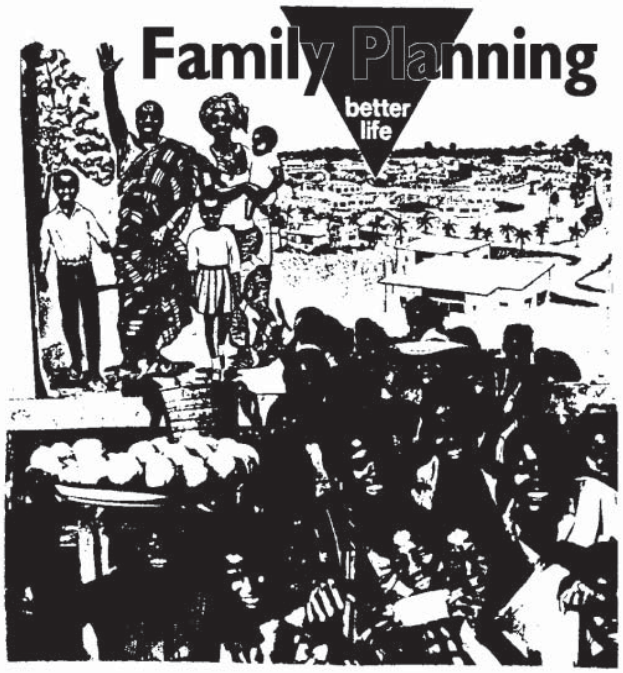

Illustration 28.1 **Posters from India and Africa encouraging people to use birth control and limit families to three children**

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(a) The United Nations Population Commission

When the United Nations Organization was set up in 1945, a Population Commission was included among its many agencies. When the Third World population began to 'explode' during the 1950s, it was the UN which took the lead in encouraging governments to introduce birth-control programmes. India and Pakistan set up family-planning clinics to advise people about the various methods of birth control available, and to provide them with cheap contraceptives. Huge publicity campaigns were launched with government posters recommending a maximum of three children per family (see Illus. 28.1). Many African governments recommended a maximum of three children, while the Chinese government went further and fixed the legal maximum at two children per family. But progress was very slow: ancient practices and attitudes were difficult to change, especially in countries like India and Pakistan. In the Roman Catholic countries of South America, the Church continued to forbid artificial birth control.

(b) How successful were the campaigns?

The best that can be said is that in parts of Asia the population growth rate was beginning to fall slightly during the 1980s; but in many African and Latin American countries it was still rising. Table 28.2 shows what could be achieved with the spread of birth control.

Table 28.3 shows the 1986 populations and growth rates of various regions, compared with the 1950–9 growth rates. The most rapid growth rate in 1986 was in Africa, where some countries had rates of over 3 per cent per year. The table also reveals how serious the problem of overcrowding was in some areas where there were on average over a hundred people to every square kilometre. This was not so serious in the developed nations of Europe, which had the prosperity and resources to support their populations; but in the poorer nations of Asia, it meant grinding poverty. Bangladesh was probably the world's most crowded country with an average of 700 people to every square kilometre. The population growth rates of Bangladesh and Britain provide a startling comparison: at the present growth rates, Bangladesh will double its population of 125 million in less than 30 years, but Britain's population of 58.6 million will take 385 years to double in size. The Population Institute predicted (December 1995) that, with effective birth control, the global population could stabilize by 2015 at about 8 billion. However, without effective promotion of family planning, the total could well have reached 14 billion by 2050. With the population of Europe and North America growing so slowly, it meant that an ever-increasing proportion of the world's population would be poor.

Table 28.2 **Use of contraceptives and the birth rate**

	% of married women using contraceptives, 1986	*Fall in the % birth-rate, 1978–86*
India	35	4.5 > 3.2
China	74	3.2 > 2.1
Colombia (S. America)	65	4.3 > 2.6
South Korea	70	3.5 > 1.6
Kenya	under 20	4.6 constant
Pakistan	under 20	4.6 constant

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Table 28.3 **Population growth rates and density**

	1986 population (millions)	*% growth rate 1950–9 (annual)*	*% growth rate 1980–5 (annual)*	*1986 population density per sq km*
N. America	266	1.75	0.9	12
Europe	493	0.75	0.3	100
USSR	281	1.4	1.0	13
Oceania	25	2.4	1.5	3
Africa	572	1.9	2.9	19
Latin America	414	2.4	2.3	20
E. Asia	1264	1.5	1.2	105
S. Asia	1601	2.2	2.2	101
World total	4916	1.7	1.5	36

On the other hand, some historians feel that the fears about the population explosion have been exaggerated. Paul Johnson, for example, believes that there is no need to panic; once Asia, Latin America and Africa become more successfully industrialized, living standards will rise, and this economic betterment, along with more effective use of contraception, will slow down the birth rate. According to Johnson, the example of China is most encouraging: 'The most important news during the 1980s, perhaps, was that the population of China appeared virtually to have stabilised.'

However, the case of China raises another issue: how far should a government go in its efforts to control population? In 1978 a group of scientists calculated that unless Chinese women were limited to one child each, China would face disaster – the country's resources would simply not be sufficient to feed the population. Conversely, if the one woman one-child limit could be achieved, then the Chinese would become prosperous and assume their rightful place among the world's leading nations. In 1980 the government duly announced the one-child policy. Historian Matthew Connelly describes what happened next:

> This was the most coercive phase in the whole history of China's one-child policy. ... All women with one child were to be inserted with a stainless steel, tamper-resistant IUD [intra-uterine device], all parents with two or more children were to be sterilized, and all unauthorized pregnancies terminated. There was not even a pro forma injunction to avoid coercion. ... In 1983 more than 16 million women and more than 4 million men were sterilized in China, nearly 18 million women were inserted with IUDs, and over 14 million underwent abortions.

There was widespread criticism of this policy in China itself. The All-China Women's Federation demanded an end to 'infanticide and the abuse of women'. There was outrage among Roman Catholics and pro-life supporters around the world, especially in the USA. Eventually the Chinese government softened the policy, but claimed that it had been successful, and was therefore justified. Now that China's population has stabilized and the birth rate is even falling, this means that there are fewer people to share the available resources; therefore standards of living should rise and poverty should be reduced. However, some observers point out that although this in itself is a great achievement, it does not solve the problems facing the ecosystem. Matthew Connelly explains why, using as an example some Asian countries which adopted population control policies:

> If Asians have only 2.1 children, but also air conditioning and automobiles, they will have a greater impact on the global ecosystem than a billion more subsistence farmers … [because] they tend to consume more of everything per capita, whether fuel, or water, or wide open spaces.

This was borne out in a joint report by a group of scientists from 105 institutions published shortly before the Earth Summit Conference of July 2012. This confirmed that one of the main causes of the rapid rise in consumption was 'the growing middle class in developed countries and the very lavish lifestyles of the very rich across the planet'. American biologist Paul Ehrlich put it this way: 'The current redistribution of wealth from poor to rich must be halted, and overconsumption by the rich must be controlled with programs such as those that transformed consumption patterns in the United States when it entered World War II.' Former World Bank economist Aklog Birara suggested that

> the world can no longer afford to follow the same economic and social model of insatiable demand and concentration of consumption and wealth in a few hands. I cannot imagine that the rest of the world would tolerate continuation of 20 per cent of humanity consuming 80 per cent of the world's goods and services, while one-fifth of the poorest consume only 1.3 per cent. Is this not what triggered the Arab Spring and is likely to trigger Springs in the rest of the poorest and most repressed countries?

This last point was taken up by Paul Liotta and James Miskel, who highlight another worrying aspect of the still growing population; the growth of huge cities with populations of over 10 million. They calculate that by 2025 there will be at least 27 of these megacities around the globe. In Africa, Asia, the Middle East and South America these massive concentrations of people inevitably include a large proportion of poverty-stricken have-nots. In the authors' words: 'Crowded masses within these unaccommodating spaces will have literally nowhere else to go; if left to their own devices by inept or uncaring governments, collective rage, despair and hunger will inevitably erupt.' They argue that megacities are attracting terrorists and various types of criminal gangs; unless governments meet this challenge by taking effective counter-measures, some of them will present a serious security threat to the rest of the world.

As the world population reached 7 billion at the end of 2011, the majority view was still that efforts to reduce population growth in areas like Africa must not be relaxed. Greater efforts should be made to provide contraceptives to everybody in the developing world who wants them; and greater use of the internet should be made to spread information about the various methods of birth control.

28.4 THE POPULATION INCREASE AND ISLAMISM

(a) Samuel Huntington and the 'clash of civilizations'

Another aspect of population growth that many Western observers found threatening was that many of the states where the population was increasing most rapidly were Muslim. It was believed that by 2020 the total Muslim population would far outweigh the non-Muslims in the West, bearing in mind also that many Muslims actually lived in the West. It was in a 1992 lecture that the American political commentator, Samuel Huntington, first proposed the 'clash of civilizations' theory. He later elaborated the theory in his book *The Clash of Civilizations and the Remaking of World Order* (1996). He argued that with end of the Cold War, the clash of ideologies was also over, and that in the future, the great conflicts would be between different cultures and civilizations. The USA would be 'the

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primary bastion, agent, champion and defender of Western civilization' against whatever challenges presented themselves. He also pointed out that the rise of the West had depended more on military force than cultural persuasion. 'The West won the world not by the superiority of its ideas or values or religion (to which few members of other civilizations were converted) but rather by its superiority in applying organized violence. Westerners often forget this fact; non-Westerners never do.'

At the time Huntington was writing, it was becoming increasingly clear that Islamism was the main challenge to Western liberal values – stable democracy, regard for human rights, and capitalist free-market economies. The Iranian revolution of 1979, which overthrew the pro-American government of the Shah Reza Pahlevi (see Section 11.1(b)) and set up an Islamic republic, was regarded by many in the West as a dangerous manifestation of the threat from Islamic fundamentalism. Even more so when Iranian students kidnapped over 50 Americans and held them hostage for 444 days, in an attempt to force the US to hand over the former Shah who was living in exile in the USA. Then in October 1981 President Sadat of Egypt was assassinated by members of a militant Islamic group, the Egyptian Islamic Jihad, because they thought he was too pro-American and he had made peace with the Israelis (see Section 11.7). Islamism came to be regarded by many in the West as synonymous with terrorism, as a whole series of attacks took place on American targets (see Section 12.2(c)): US embassies in Beirut and Kuwait (1983 – carried out by Islamic Jihad), the US embassies in Nairobi (Kenya) and Dar-es-Salaam (Tanzania – both in 1988), the destruction of the airliner over Scotland with the loss of 270 lives (1988), a bomb explosion in the World Trade Center in New York (1993), the damaging of the destroyer *Cole* in harbour in Yemen (2000) and the following year the climax of 9/11 with the destruction of the World Trade Center in New York (see Section 12.3). Many Americans condemned Islam as a whole, calling Muslims 'a colossal threat' and 'a failed faith and civilization', and claiming that Muslims everywhere 'lack the liberal gene'. As President Bush launched his 'war against terrorism' with the attack on Afghanistan, announcing that countries were 'either with us or against us', it looked as though Huntington's predictions were about to become reality.

However, Raymond Baker (see *Further Reading*) argues that such blanket condemnations of Islam ignore some of the most influential Islamic thinkers of the last half-century, who have put forward a vision of Islam that champions 'rationality, science, education, tolerance, social justice, democracy and political participation. In Turkey, for example, democracy has worked successfully and Islamists have done well in elections. Compared with other parties, "they are perceived by the population to be greatly supportive of local communities".' In Palestine, the militant Hamas Party won the election fairly in 2006; but the USA, claiming to be committed to democracy, were most reluctant to accept the voters' verdict (see Section 11.11(g)). Certainly many respected Muslim writers had already rejected the 'clash of civilizations' theory. Abdullahi Ahmed An-Na'im, a professor of law in Atlanta, USA, and formerly of the University of Khartoum (Sudan), argued that 'all the governments of predominantly Islamic countries have clearly and consistently acted in consideration of their own economic, political or security interests. What is happening everywhere is simply the politics of power, as usual, not the manifestation of a clash of civilizations.' During the 1990s the UN and NATO actually supported Muslims in Kosovo and Bosnia (see Section 10.7), as well as in Somalia and Chechnya. In the aftermath of the 9/11 attacks on the USA, some Muslim states sided with the Americans and offered their support. Pakistan provided vital help, and its president, Pervez Musharraf, condemned Pakistani extremists for bringing Islam into disrepute. Thus Pakistan received considerable financial aid from the USA in return for its co-operation, as did Kazakhstan, Tajikistan and Uzbekistan. Another Muslim, Ziauddin Sardar, wrote (*Observer*, 16 September 2001) that 'Islam cannot explain the actions of the suicide hijackers, just as Christianity cannot explain the gas chambers, or Catholicism the bombing at Omagh. They

are acts beyond belief by people who long ago abandoned the path of Islam.' He insisted that terrorist actions were completely alien to the faith and reasoning of Islam; it was a war against a small group of Muslim terrorists [al-Qaeda] and the rogue states that were harbouring them.

Other writers have made the point that Islamism, like Christianity, is far from being a united entity. There are at least three major divisions of Islam and many subdivisions and groups. Paul Berman (in *Terror and Liberalism*, 2004 edition), an American political and cultural critic, argues that distinct cultural boundaries do not exist – there is no 'Islamic civilization', nor a 'Western civilization', and that the evidence for a civilization clash is therefore not convincing. Edward Said pointed out that the Islamic world numbers over a billion people, includes dozens of countries, societies, traditions, languages and, of course, an infinite number of different experiences. It is therefore simply false to treat them all as a monolithic entity called Islamists, who are inherently violent, who are anti-modern and anti-liberal, who do not believe in democracy and who want to turn the clock back to the seventh century, when Islam began. Noam Chomsky has dismissed the whole theory as being merely a new justification for the USA 'for any atrocities that they wanted to carry out'. The USA needed a new threat on which to lay the blame for their interventionist policies, now that the Soviet Union was no longer a viable threat. And indeed one example of this: the invasion of Iraq was blamed on al-Qaeda and Saddam Hussein's non-existent weapons of mass destruction, when in fact the real reason for the attack was to enable the USA to protect their oil supplies.

(b) Islamism and its beliefs and principles

Founded by the Prophet Mohammed (570–632) in Mecca, Islam (meaning 'submission', because Muslims submit themselves to the will of God) soon spread throughout Arabia. At its furthest extent it reached across North Africa and into Southern Spain, Malaya, Indonesia, Turkey and eastern Europe, following the capture of Constantinople (Istanbul) in 1453. Mohammed claimed to have received messages from the angel Gabriel, which were written down by his followers, and formed the Muslim holy book, the Koran. This contains the Five Pillars of Islam, the five basic obligatory acts: saying the creed, daily prayers, giving alms for the poor, fasting during Ramadan and making the pilgrimage to Mecca at least once. In addition, Muslims must follow Islamic law, which deals with virtually every aspect of life and society.

As with Christianity, there are several different denominations:

- **Sunni:** these are the largest denomination, making up over 80 per cent of all Muslims. There are several divisions within the Sunnis, some moderate and peaceful, others more extreme, such as Salafi and Jihadists (who believe in a holy war).
- **Shia:** they are the second largest group, making up more than 10 per cent of the total. They share many of the core beliefs and practises of Islam with Sunnis; but the main division occurred over the question of who was the true successor to Mohammed himself. Sunnis believe that Mohammed did not appoint a successor, and that God's choice for the next leader would be shown through an election. Shias, on the other hand, believe that Mohammed appointed his son-in-law, Ali ibn Abi Talib, and that therefore he was the first Imam (leader). This means that the Caliphs elected after Mohammed's death are not regarded as legitimate leaders by Shias. Sunnis and Shias also disagree on which hadiths (reports about Mohammed's words and actions) are the most important. To complicate matters further, Shias themselves have several divisions, including Zaidis, Alawites, Twelvers and Druze.

In Iraq Shia are the majority group; after the war in 2003, the militant Sunnis launched an uprising against both the Shia and the foreign occupiers (see Section 12.4(f)).

- **Sufis:** Sufism is a branch of Islam that focuses on the more spiritual aspects of religion. It began as a reaction against the wealthy lifestyles of many leading Muslims. Sufis tried to lead simple and austere lives of service to others, aiming for spiritual perfection and a direct experience of God.

Most Islamists agree that Islam must be involved in politics. They believe that in some way governments must incorporate Muslim principles, concepts and traditions into their policies. One of their central goals is to introduce sharia (Islamic) law in countries that they control. Some believe in achieving this peacefully, but others are prepared to use violence. The West's conception of Islamism is probably skewed by the fact that the media tends to focus on violent groups such as al-Qaeda, whereas some of the most popular, dynamic and influential Islamists, such as the Muslim Brotherhood in Egypt, the Islamic Action Front in Jordan and the Justice and Benevolence movement in Morocco, get less attention. In Morocco the media has focused on an extremist Salafi group which in May 2003 carried out horrific bombings that killed 45 people. Compared with that, Justice and Benevolence is moderate and benign.

(c) The situation in 2012

In September 2012, anti-American and anti-Western protests swept through the Muslim world following the showing on YouTube of an American film, *The Innocence of Muslims*. This was extremely insulting to the prophet Mohammed. The protests began in Libya where Islamists attacked the US consulate and killed four Americans, including the US ambassador. It emerged that the attacks had been carried out by an Islamist militia known as Ansar al-Sharia (supporters of Sharia law). As the anti-West protests, many of them violent, spread around the globe, it seemed that the world was on the brink of the long-predicted great civilizations clash.

Then events took an unexpected turn. In Libya counter-protests began to appear, demanding that the militias, which were operating outside government control, should be disbanded. The Jihadist formations Ansar al-Sharia and Abu Salem, together with several other militias, agreed to disband and hand over their weapons, claiming that they had decided their role was over. This left a number of active militias that would take time to deal with, but it was a move in the right direction. It demonstrated clearly what many writers had been arguing for the last 20 years: that the majority of Muslims are moderate and peace-loving, and those in the Third World are facing the usual problem – the struggle to feed their families. They probably have neither the time nor the inclination to take part in a struggle between rival civilizations. The terrorists represent just one strand of militant Islamic fundamentalism, which is intolerant and anti-modern. In fact, all religions have their fanatics, whose extreme beliefs often contradict the very religions they claim to embrace. Francis Fukuyama, writing in 2002, argued that the idea of the theocratic Islamic state is appealing in theory, but that the reality is less appealing:

> Those who have actually had to live under such regimes, for example, in Iran or Afghanistan, have experienced stifling dictatorships whose leaders are more clueless than most on how to overcome the problems of poverty and stagnation. ... Even as the September 11th events unfolded, there were continuing demonstrations in Tehran and many other Iranian cities on the part of tens of thousands of young people fed up with the Islamic regime and wanting a more liberal political order.

This does not mean, of course, that Muslims do not have genuine grievances. The root cause that lay behind much of the terrorism was Third World poverty, human rights abuses and the ever-widening gap between rich and poor. On the one hand there was the Western capitalist system, thriving on profit-led globalization (though less so after the 2008 financial crisis) and its ruthless exploitation of the rest of the world. On the other hand there was the Third World, which saw itself as marginalized and deprived, and where all manner of problems were rife – famine, drought, AIDS, crippling debts and corrupt governments which abused human rights and failed to share the wealth of their countries among ordinary citizens. Some of these governments, such as President Mubarak's regime in Egypt, were supported by the West, because they were good at suppressing potential terrorists. The problem with the so-called 'war on terrorism' was that it had concentrated on military and police action, with not much evidence of successful aid and nation-building. In Muslim and Arab eyes, the whole situation is epitomized in the Arab–Israeli conflict. On the one hand there is Israel, wealthy, heavily armed, guilty of violating UN resolutions and supported by the USA. On the other hand there are the Palestinians, marginalized, deprived of their land, poverty-stricken and without much hope of improvement. Until these problems are addressed seriously, it is unlikely that the Muslim world and the West can ever be on close terms.

27.5 THE HIV/AIDS EPIDEMIC

(a) The beginnings

In the early 1980s AIDS (Acquired Immune Deficiency Syndrome) was thought to be a disease that mainly affected homosexual men; some people called it the 'gay plague'. Another group which contracted the disease were people who used unsterilized syringes to inject themselves with drugs. At first it was in the wealthy countries of the West, particularly the USA, that most cases were reported, but after governments had launched campaigns about sexual health and the use of condoms to prevent the transmission of HIV (Human Immunodeficiency Virus), the outbreaks seemed to have been brought under control. The widespread use of anti-retroviral (ARV) drugs therapy slowed down the development of the virus and enabled people to live much longer.

It was something of a shock when, during the 1990s, the world became aware that the disease had spread to the poorest countries in the world, and that in Africa it had reached epidemic proportions. Scientists now know that it takes an average of eight to ten years for HIV infection to develop into full-blown AIDS, which was why the virus was able to spread so widely before it was recognized. The epidemic also spread to India, China and the countries of the former USSR. Tony Barnett and Alan Whiteside, in their recent book *AIDS in the 21st Century* (2002), showed how each epidemic was different: in *China* the main causes were contaminated needles and the practice of selling blood at state-run blood collection points in the early 1990s. The World Health Organization (WHO) estimated that two-thirds of injections given in China were unsafe and that much of the collected blood plasma was infected. When the symptoms of AIDS began to appear, local officials tried to suppress the news. It was only in 2003 that the government admitted publicly that over a million of its citizens were HIV-positive; the infection was increasing by 30 per cent a year and 10 million could be affected by 2010. In *Russia* and *Ukraine* the highest rates were among injecting drug-users, especially those in prison. Experts calculate that once HIV enters the general population and infects around 5 per cent of adults, a general epidemic is likely to follow, as it has in southern Africa.

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(b) AIDS in southern Africa

The first cases to be reported in Africa were in a fishing village in south-west Uganda, in the mid-1980s. The HIV virus spread rapidly, transmitted mainly by unprotected hetero-sexual sex. Governments were slow to realize the significance of what was happening and aid agencies made no provision for dealing with the disease in their assistance programmes. It was in 2001 that a report by the International Crisis Group (ICG) sounded alarm bells. It said that the impact of HIV on Africa was as though it was involved in a major war. The report concentrated on Botswana, but it warned that the impact of AIDS on Africa as a whole was likely to be devastating within just a few years, if nothing was done about it. The report was not exaggerating: in 2001, 3 million people died from the disease in Africa, and 5 million became infected. By 2003 it was estimated that 29.4 million people were living with HIV or AIDS in Africa, and this was about 70 per cent of the global total. A further 3 million people died from the virus in Africa during 2003.

By that year HIV prevalence levels had risen to horrifying proportions. In Botswana and Swaziland, almost 40 per cent of adults were living with the virus or with full-blown AIDS, and the percentage was almost as high in Zimbabwe. In South Africa the prevalence level was 25 per cent. Life expectancy in southern Africa, which had reached the sixties by 1990, had fallen again to the lower forties; in Zimbabwe it was down to 33. One of the tragic side effects of the pandemic was the huge numbers of children left without parents. In Uganda there were over a million orphans; the WHO estimated that by 2010 there were likely to be 20 million AIDS orphans in Africa. There were economic effects too: a substantial proportion of the labour force was being lost, with all its skills and experience. This was being felt especially in farming and food production, while the deaths of so many young women was an irreplaceable loss to the domestic economy and to child-rearing. At the same time there was an increased demand for people to nurse the sick and care for orphaned children.

Why was the epidemic so much worse in southern Africa?

HIV was able to spread more quickly in conditions of poverty, where there was very little access to information and education about the virus and how to prevent it spreading. Widespread hunger reduced resistance to the disease and accelerated the progress from HIV to AIDS. Nor were any of the expensive anti-retroviral drugs available for Africans. The large number of civil wars in Africa produced thousands of refugees, who were often cut off from their normal healthcare services. In emergency situations like these, there was a greater danger of the HIV virus being spread through contaminated blood. Most African governments took a long time to acknowledge what was happening, partly because of the stigma attached to the disease: the belief that it was caused by homosexual sex and the general reluctance to discuss sexual habits. South Africa itself was one of the slowest to take action, mainly because President Mbeki refused to accept the link between HIV and AIDS.

(c) What is being done to combat AIDS?

The experts know what needs to be done to bring the AIDS epidemic under control: people must be persuaded to have safe sex and use condoms; and somehow governments must be able to provide cheap ARV treatment. Brazil is one country where the campaign has slowed down the spread of the disease. In Africa, governments have concentrated on the so-called 'ABC' message: 'Abstain from sex. Be faithful to one partner, and if you cannot, use a Condom.' Uganda provides the great African success story; the government

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admitted to the WHO in 1986 that they had some AIDS cases, and President Museveni personally took charge of the campaign, travelling round from village to village to talk about the problem and what should be done. Uganda was the first country in Africa to launch the ABC campaign and provide cheap condoms for its people. People were encouraged to come forward voluntarily for testing. The programme was financed jointly by the government, by aid agencies and by religious organizations and churches. Uganda's meagre resources were strained to the limits, but the campaign worked, even though very few people had access to ARV drugs: Uganda's HIV prevalence rate had peaked at 20 per cent in 1991, but by the end of 2003 it had fallen to about 5 per cent. The epidemic had passed its acute stage, but the problem of orphaned children was just reaching its height.

Elsewhere in Africa and China, governments were slow off the mark and the epidemic took a firmer hold, reaching crisis proportions in 2003. Some African countries were beginning to follow Uganda's example. In Malawi, President Muluzi set up an AIDS commission and appointed a special minister to deal with the problem. But huge sums of money are needed to finance the necessary three-pronged attack on HIV/AIDS across Southern Africa:

- ABC campaigns or some equivalent;
- anti-retroviral drugs – these are much cheaper now, since pharmaceutical companies gave way to political pressure and allowed drugs to be supplied more cheaply to poorer countries;
- healthcare systems and infrastructures, which in most poor states need modernizing in order to cope with the magnitude of the problem; more doctors and nurses are required.

There are several international agencies trying to deal with the disease, the most important being the UN's Global Fund to Fight AIDS, TB and Malaria; the World Health Organization (WHO); and UNAIDS. In December 2003, UN secretary-general Kofi Annan complained that he was 'angry, distressed and helpless'; 1 December was World AIDS Day, but the outlook was bleak. Reports from all over the Third World showed that the war against the disease was being lost; the virus was still spreading and 40 million people were living with HIV. The UN Fund said it would need £7 billion by 2005 and the WHO wanted £4 billion. Many wealthy countries have given generously; the USA, for example, has promised $15 billion over the next five years, but insists that the money be spent in the way it specifies. The Bush administration favoured programmes which promoted abstinence against those that advocated the use of condoms. The Roman Catholic Church also continues to oppose the use of condoms, even though scientists have shown that it is the best means of prevention available. No wonder Kofi Annan was angry; 'I am not winning the war', he said, 'because I don't think the leaders of the world are engaged enough.'

By 2012 well over 30 million people had died from AIDS since the first cases were identified in 1981. An estimated 1.8 million of them died in 2010 alone, two-thirds of them in southern Africa, where nearly 15 million children were left orphaned. In the same year around 2.7 million people became infected with HIV. According to the WHO, the attempts to control the epidemic have been intensified; from 2002–8 spending on the campaign in low- and middle-income countries increased sixfold. Since 2008 spending has not increased, but at least the level has been maintained. In May 2012 the WHO published a plan of priority action for the next two years: focusing on HIV prevention, encouraging people who might be at risk to get themselves tested regularly, providing even wider access to cheap ARV drugs and improving and modernizing healthcare systems, especially in southern Africa. There were some encouraging signs: more people than ever before were receiving ARV treatment, the annual number of AIDS deaths had declined and the

global percentage of people infected with HIV seemed to have stabilized. However, the UN agencies warn that recent achievements should not lead to complacency; on no account should efforts be relaxed. In fact in eastern Europe infection rates were still rising; and in the USA in June 2012 more than one million people were living with HIV, but probably 20 per cent of them didn't know they were infected.

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QUESTIONS

1 Explain the causes and consequences of the rapid growth in the world's population during the twentieth century.
2 What methods were used to try to control population growth in the second half of the twentieth century, and why did some of them arouse criticism?
3 Why was it that in the second half of the twentieth century the rate of population growth in Europe slowed down, while in Africa and other Third World areas it accelerated?

There is a document question about the HIV/AIDS epidemic on the website.

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